

Organization Security Overview

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Apply Organization Security Setup

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Populate Organizations

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Display Authorized Reports

FILE EDIT OPTIONS PROCESS HELP Applied Technologies Inc 1 (Environment Name - C71T10B7QER) Deltek Costpoint

Browse Applications > Admin > System Administration > System Administration Controls > Configure System Settings

System Settings

Company Settings Batch Job Case Reporting

☐ Apply Organization Security

☒ Allow HR Org Manager/Rep from Org

Email System

SMTP Server Name * SMTP

SMTP Server User ID

E-mail Redirect

☐ Require SSL / TLS

Company Defaults

☒ Print Cover Page

Costpoint User Accounts

☒ Auto-create User Accounts

Authentication Method

Preferred Notification Method

Default Settings

Default Page Size

Page Size -None-

Top Margin

Default Font Arial Narrow

Default Locale * en_US English (United States) ☒ Print Currency Symbol

Company Logo

Footer Label

Width

Margin

This click-thru introduces organization security in Materials Management and shows you how to use this feature to ensure that correct access is applied to organizations as authorized for your user ID.

- Click or tap each step on the screen or use the Continue button to advance.
- Use the navigation buttons on the left pane and within the pages to go to specific steps.
- Use the arrows on your keyboard to go to the previous or next page.

Begin

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FILE LINE OPTIONS PROCESS HELP

Browse Applications > Admin > System Administration > System Administration Controls > Configure System Settings

System Settings

Company Settings | Batch Job | Case Reporting

☒ **Apply Organization Security**

☒ Allow HR Org Manager/Rep from Other Companies

Color: Thistle | ☒ Display System in the Header

Reskin env

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

Costpoint User Accounts

☒ Auto-create User Accounts

Authentication Method: Sign | Employee Override:

Preferred Notification Method: Email

Default Settings

Default Page Size

Page Size: -None- | Page Height: | Page Width:

Top Margin: | Left Margin: | Right Margin:

Default Font: Arial Narrow

Default Locale*: en_US

Company Logo: | ☒ Print Currency Symbol

Footer Label: |

Footer Text: |

Corporate Settings

General Settings | Security Settings

Batch Job Retry Defaults

Number of Retries*: 0 | Licensing Email ID*: debbiewhite@deltek.com

1 Select **Apply Organization Security**.

Continue

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

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Modules

<input checked="" type="checkbox"/>	Module	Module Name	Apply Org Security	Domain
	MS	Master Production Scheduling	<input type="checkbox"/>	Materials
	OE	Sales Order Entry	<input type="checkbox"/>	Materials
	PC	Production Control	<input type="checkbox"/>	Materials
	PO	Purchasing	<input type="checkbox"/>	Materials
<input checked="" type="checkbox"/>	PP	Procurement Planning	<input checked="" type="checkbox"/>	Materials
	RC	Receiving	<input type="checkbox"/>	Materials

Applications

<input checked="" type="checkbox"/>	Application	Application Name	Apply Org Security
	POQITEM	View Item Purchasing Information	<input type="checkbox"/>
	PPMBUYAL	Assign Purchase Requisition Lines to Buyers	<input type="checkbox"/>
	PPMBUYAS	Assign Purchase Requisitions to Buyers	<input type="checkbox"/>
<input checked="" type="checkbox"/>	PPMNTRQ1	Manage Purchase Requisitions	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	PPMNTRQ2	Apply PO Info to Purchase Requisitions	<input checked="" type="checkbox"/>
	PPMQREQ	Manage Simple Purchase Requisitions	<input type="checkbox"/>
	PPMRQAPL	Approve Purchase Requisition Lines	<input type="checkbox"/>
	PPMRQAPX	Approve Purchase Requisitions	<input type="checkbox"/>

Continue

You can enable or disable organizational security to transactions screens. This information is stored at the module level in the Module Settings table and at the application level (by module) in the Applications Settings table for ease of retrieval. There will be additional flags in the System Module and System Application Function tables to indicate those modules and applications that are always excluded from organizational security as determined by Deltek.

Set up this screen before establishing organization security profiles and organization security groups.

You can invoke organizational security by company on the Configure System Settings screen when you select the Apply Organization Security check box in the Company Settings tab. By default, this company-wide organization security system setting applies to all users. You can, however, establish an organizational profile and an organization security group that effectively acts as an override by removing organization security for users assigned to that organization security group.

Before you implement organizational security by selecting the Apply Organization Security check box in the Configure System Settings screen, first establish organization security profiles and organization security groups to avoid interrupting processing functions.

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Modules

Module	Module Name	Apply Org Security	Domain
MS	Master Production Scheduling	<input type="checkbox"/>	Materials
OE	Sales Order Entry	<input type="checkbox"/>	Materials
PC	Production Control	<input type="checkbox"/>	Materials
PO	Purchasing	<input type="checkbox"/>	Materials
✓ PP	Procurement Planning	<input checked="" type="checkbox"/>	Materials
RC	Receiving	<input type="checkbox"/>	Materials

Applications

Application	Application Name	Apply Org Security
POQITEM	View Item Purchasing Information	<input type="checkbox"/>
PPMBUYAL	Assign Purchase Requisition Lines to Buyers	<input type="checkbox"/>
PPMBUYAS	Assign Purchase Requisitions to Buyers	<input type="checkbox"/>
✓ PPMNTRQ1	Manage Purchase Requisitions	<input checked="" type="checkbox"/>
✓ PPMNTRQ2	Apply PO Info to Purchase Requisitions	<input checked="" type="checkbox"/>
PPMQREQ	Manage Simple Purchase Requisitions	<input type="checkbox"/>
PPMRQAPL	Approve Purchase Requisition Lines	<input type="checkbox"/>
PPMRQAPX	Approve Purchase Requisitions	<input type="checkbox"/>

1

On the Activate/Inactivate Organization Security by Module (SYMORGFN) screen, select **Apply Org Security** for the module(s) and application(s) you want to apply organization security to.

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FILE LINE OPTIONS PROCESS HELP Applied Technologies Inc1 (Reskin env - C71T10B7PSM17LAB) Deltek Costpoint

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

Organization Security Profile

New Copy Delete 1 of 1 New Table Query

Profile ID *

☒ Apply Org Security

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

If organization security is enabled for a module/application, but an organization security profile is not found for a user, then the user can neither enter an organization nor use it for transactions.

Assign Organizations to Profile

New Copy Delete Query

	Relation *	Rights *
<input checked="" type="checkbox"/>		

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

Select this check box to grant a profile 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.

Continue

Use this screen to set up organization security profiles and identify the organizations to which a particular profile has access. You can then assign profile IDs to a module using the Manage Organization Security Groups screen.

This screen is the starting point for setting up organizational security. However, you may first want to enable or disable those modules and applications for which you want to apply organizational security using the Activate/Inactivate Organization Security by Module screen.

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FILE LINE OPTIONS PROCESS HELP Applied Technologies Inc1 (Reskin env - C71T10B7PSM17LAB) Deltek Costpoint

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

Organization Security Profile

New Copy Delete 1 of 1 New Table Query

Profile ID * Name *

☒ Apply Org Security

Rights Application Method

☒ Inclusive ☐ Exclusive ☐ Both

Assign Organizations to Profile

New Copy Delete Query

<input checked="" type="checkbox"/>	Organization *	Organization N

1

Select **Inclusive** to display all organizations to which a profile have rights to in the **Assign Organizations to Profile** table window.

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FILE LINE OPTIONS PROCESS HELP

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

Organization Security Profile

Profile ID *	Profile Name *	Apply Org Security	Rights Application Method *
AD-P01	AD-PROFILE ID	<input checked="" type="checkbox"/>	Both
AD-PRO	profile	<input checked="" type="checkbox"/>	Inclusive
AD003	AD003	<input checked="" type="checkbox"/>	Inclusive
AD1220	12200 ORG ONLY	<input checked="" type="checkbox"/>	Inclusive
AD1330	AD1330	<input checked="" type="checkbox"/>	Inclusive

Assign Organizations to Profile

Organization *	Organization Name	Relation *	Rights *
4.021.700	TK 4021700	Begins With	Full

The inclusive rights grants the profile ID full rights to the organizations listed.

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

Organization Security Profile

New Copy Delete 1 of 1 New Table Query

Profile ID * Name *

Apply Org Security ☒ Rights Application Method

☒ Inclusive ☐ Exclusive ☐ Both

Assign Organizations to Profile

New Copy Delete Query

<input checked="" type="checkbox"/>	Organization *	Organization Name
-------------------------------------	----------------	-------------------

1 Select **Exclusive** to display all organizations to which a profile does not have rights in the **Assign Organizations to Profile** table window.

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Organization Security Profile

Profile ID *	Profile Name *	Apply Org Security	Rights Application Method *
ADB2	ADB2	<input checked="" type="checkbox"/>	Both
ADC	ADC	<input checked="" type="checkbox"/>	Both
ADEX	exclusive TO ALL ORG =1	<input checked="" type="checkbox"/>	Exclusive
ADI	AD-INCLUSIVE	<input type="checkbox"/>	Inclusive
ADI2	INCLUSIVE	<input checked="" type="checkbox"/>	Inclusive

Assign Organizations to Profile

Organization *	Organization Name	Relation *	Rights *
1	SuperTech, Inc.	Begins With	None

The exclusive rights grants the profile ID full rights to the other organizations not listed in the **Assign Organizations to Profile** table window.

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

Organization Security Profile

New Copy Delete 1 of 1 New Table Query

Profile ID * Name *

– Rights Application Method

☒ Apply Org Security ☒ Inclusive ☐ Exclusive ☐ Both

Assign Organizations to Profile

New Copy Delete Query

<input checked="" type="checkbox"/>	Organization *	Organization Name	R
-------------------------------------	----------------	-------------------	---

1 Select **Both** to display all organizations to which this profile is associated with in the **Assign Organizations to Profile** table window. This is useful if you want to provide access to most, but not all, branches of a particular organization tree.

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Organization Security Profile

New Copy Delete Form Query

Profile ID *	Profile Name *	Apply Org Security	Rights Application Method *
AD1220	12200 ORG ONLY	<input checked="" type="checkbox"/>	Inclusive
AD1330	AD1330	<input checked="" type="checkbox"/>	Inclusive
ADB	ADB	<input type="checkbox"/>	Both
ADB2	ADB2	<input checked="" type="checkbox"/>	Both
ADC	ADC	<input checked="" type="checkbox"/>	Both

Assign Organizations to Profile

New Copy Delete Query

Organization *	Organization Name	Relation *	Rights *
1.1.100	Accounting	Equals	Full
1.2	Engineering Services	Begins With	Full
1.2.200	Product Development	Equals	None
1.3	Manufacturing	Begins With	Full
1.3.300	Tool & Die	Equals	None
1.8	1.8	Equals	None

if this option is selected, then you can grant or deny access to certain organization IDs for a profile.

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Use this screen to set up organizational security groups to which you can assign an organizational security profile for each module.

This screen contains an identification code for the security group, a name, and a table window containing all of the modules for which you are licensed. For each module, you need to specify an organizational profile ID that was set up on the Manage Organization Security Profiles screen.

1

Enter an identification code and a descriptive name for this organization security group.

Enter the security profile you want to assign to Costpoint modules.

The field to the right displays the descriptive name for this organization security profile. Alternatively, you can click in this unlabeled field to select the name of the organization security profile, instead of its identification code, you want to use.

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FILE LINE OPTIONS PROCESS HELP

Company 1 (Sample Env. Name 123 - C71MQC011Q1) Deltak Costpoint

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

Organization Security Group

Organization Security Group* 100 Name*

Organization Security Profile to Assign JEFA test Assign Profiles

Assign Profiles To Modules

Module	Module Description	Organization Security Profile*	Profile Name
→ HK	Deferred Compensation Admin	JEFA	test
→ HB	Benefits	JEFA	test
→ EC	Engineering Change Notices	JEFA	test
→ PP	Procurement Planning	JEFA	test
→ PO	Purchasing	JEFA	test
→ RC	Receiving	JEFA	test
→ IN	Inventory	JEFA	test
→ PC	Production Control	JEFA	test

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.

1
Click **Assign Profiles** to assign the selected security profile in the **Organization Security Profile to Assign** field to all modules in Costpoint.

This populates the **Assign Profiles to Modules** table window.

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FILE LINE OPTIONS PROCESS HELP

Applied Technologies Inc1 (Reskin env - C71T10B7PSM17LAB) Deltek Costpoint

Browse Applications > Admin > Security > System Security > Manage User Groups

User Groups

1 Assign organization security group to the user ID.

Use this screen to set up user groups for Costpoint and to establish module/application/result set security rights for user groups within the Costpoint screens.

Continue

User *

	User *	Name
1002		
1006		Carr,Linda

ACCTPAY

ALL

B&P

CER_AC

CER_AD

CER_AD

New Copy Delete Query

Active Directory Groups UI Profiles

Copy Delete Query

Close

You must establish at least one user group for each company before you can create any user ID in the Manage Users screen.

If you plan to optionally assign a user group to a user, you must set up the user group first. You may find, however, that the most efficient way to set up security rights for users is to first establish rights for user groups. Then, if necessary, you can use the Module Rights and other drill-down subtasks from the Manage Users screen to override group rights for a specific user at the module, application, result set, or action/report rights by result set levels, as desired.

You can assign users to user groups on this screen or using the Manage Users screen. You must establish user information using the Manage Users screen before you assign users to a user group on this screen.

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FILE LINE OPTIONS PROCESS HELP

Browse Applications > Admin > Security > System Security > Manage Users

Manage Users

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 AutoComplete	Use Auto Position mode
ORGSEC-USER1	Org Sec, Emp1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	ORGSECEMP1						<input checked="" type="checkbox"/>	Default
ORGSEC-USER2	Org Sec, emp2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	ORGSECEMP2						<input checked="" type="checkbox"/>	Default
ORGSEC-USER20	Org Sec, emp2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	ORGSECEMP2						<input checked="" type="checkbox"/>	Default
ORGSEC-USER3	Org Sec, Emp3	<input checked="" type="checkbox"/>	<input type="checkbox"/>	ORGSECEMP3						<input checked="" type="checkbox"/>	Default
ORGSECUSER1	Shayne, Lucy	<input checked="" type="checkbox"/>	<input type="checkbox"/>	100						<input checked="" type="checkbox"/>	Default
ORGSECUSER10	Shayne, Lucy	<input checked="" type="checkbox"/>	<input type="checkbox"/>	100					maryalemania@deltek.com	<input checked="" type="checkbox"/>	Default
ORGSECUSER11	EMPLOYEE1, EMPLOYEE1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	EMPLOYEE1						<input checked="" type="checkbox"/>	Default
ORGSECUSER2	EMPLOYEE2, EMPLOYEE2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	EMPLOYEE2					maryalemania@deltek.com	<input checked="" type="checkbox"/>	Default
ORGSECUSER3	EMPLOYEE1, EMPLOYEE1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	EMPLOYEE1					maryalemania@deltek.com	<input checked="" type="checkbox"/>	Default
ORGSECUSERHANDLE	EMPLOYEE2, EMPLOYEE2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	EMPLOYEE2						<input checked="" type="checkbox"/>	Default

1
Assign organization security group to users.

Continue

Use this screen to assign organizational security group to users. You can assign an employee ID to multiple Users.

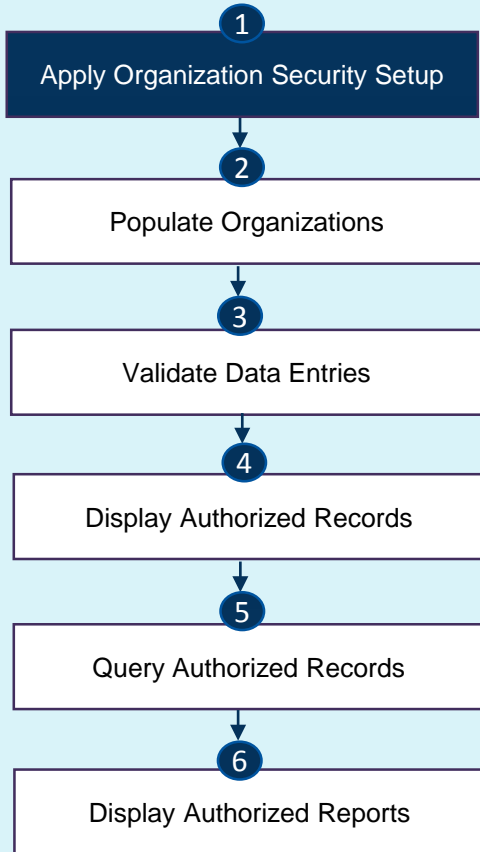
You can also link employees to user IDs from the Manage Employee Information (LDMEINFO) screen.

Assigned User Groups Module Rights Application Rights UI Profiles

Company ID *	Default Taxable Entity	Group ID	Labor	Security Group Name	Taxable Entity Name
1	DM01		<input type="checkbox"/>		DM01

Close

Organization Security Overview



FILE LINE OPTIONS PROCESS HELP Applied Technologies Inc1 (Reskin env - C71T10B7PSM17LAB) Deltek Costpoint

Browse Applications > Update Org Security Profiles > Organizational Security > Update Organization Security Profiles

Identification

Parameter ID * Description *

Selection Ranges

Option Start End

Profile

1 Run this application either after setting up all organizational profiles or 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.

Continue

Use this screen to create and/or maintain the Org Security Lookup table.

All of the organizational profile information is merged into one table and, at the same time, the wild cards are eliminated for speed of data retrieval. The Organization Security Profile table contains all organizations to which each profile has access, whether the rights application method is set to inclusive or exclusive. The speed of this process depends on the rights application method associated with each profile.

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Company 1 (Sample Env. Name 123 - C71MQC011Q1) Delttek Costpoint

Browse Applications > Reload Settings > System Administration Utilities > Rebuild Global Settings

Reload Global Settings

(Batch Mode)
Reload Settings

Parameter ID *	Parameter Description *	Accounts Payable	Accounts Receivable	Fixed Assets Autocreate	Billing EDI	Billing	Cobra Interface	Compensation	Consolidations	Currency	Engineering Change Notices	Employee Self Service	Fixed Assets	Fiscal Years	GL Configuration	GL Structure	HR Affirmative Action	HR Bene
1	one																	
2	2																	
3	3																	
4	TEST2																	
AAA	AAAAA																	
APP	app																	
APPURVR	APPPURVR																	
AWE	AWE																	
CC	cc																	
RTEST	Rain Test Defa																	
RTEST2	RTEST2 INDV																	
RTEST3	RTEST3 SYS																	
RTEST4	RTEST4																	
SH	RELOAD TEST																	
SS	ss																	
TEST	test																	
TEST1	test																	
TEST2	test																	
TEST3	test																	

1 Log out of the system and log back in if the logged-in user ID is associated to organization security group/profile so that the changes will take effect.

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Company 1 (Sample Env. Name 123 - C71MQC011Q1) Delttek Costpoint

Browse Applications > Load Organization IDs

Load Organization IDs
Print/Load Organization IDs

(Batch Mode)
Print/Load Organization IDs
Show/Hide Screen Controls

Identification

Parameter ID * Description *

This utility will allow users to pop Organization field in Requisitions where it is blank based on the Organization Source selected on the screen.

Selection Ranges

Option	Start	End
Requisition		
Requisitioner		
Requisition Date		

Options

Include Requisition Status

☒ Pending
☒ Approved
☒ Closed

☒ PO Generated

Source Organization

☒ Requisitioner's Home Org
☐ Others

2

Run this utility for each module prior to turning on organization security to populate home organizations.

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Use the utility screens 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.

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FILE LINE OPTIONS PROCESS HELP Company 1 (Sample Env. Name 123 - C71MQC011Q1) Deltek Costpoint

Browse Applications > Materials > Procurement Planning > Purchase Requisitions > Manage Purchase Requisitions

Manage Purchase Requisitions / Apply PO Info to Requisitions

New Copy Delete 1 of 953 Existing Table Query

Requisition ID: 00-0002 Rev: [] Approved [] Submit for Approval Trans Currency: USD

Header Accounting Defaults Other Information Notes Assign PO

- Requisitioner

Requisitioner*: 1JEAN Archer7890112345XXXXXXXXXX

Organization: 1.1 Phone: [] Extension: []

☐ Subcontractor Agreement ☐ Combined []

Buyer: []

Sales Tax/VAT Total: 0.36 Req Total: []

Requisition Date*: 03/13/2000
Target Place Date: []
Date Entered: 03/13/2000
Buyer Assignment Date: []
Procurement Type: []

[Hdr Approvals](#) [Totals](#) [Exchange Rates](#) [Hdr Documents](#) [Link SCI/SAP Security Codes](#)

Requisition Lines

New Copy Delete Form Query

Req Line*	St	Part Security	Requested Date*	Req U/M	Quantity	Inv Abbrev	Taxable	Ship ID	Sales Tax/VAT Rate	Est Cost Type	Est Unit Cost Amt	Est Extended Cost Amt	Est Line Charge Amt	Est Sales Tax/VAT Amt	Cost
1	Approved	Unrestricted	04/04/2000	EA	10		No	SHIPIDTAX	4.5000%		2.00	20.00	0.00	0.00	
2	Approved	N/A	04/04/2000	HR	0		Yes	SHIPIDTAX	4.5000%		0.00	8.00	0.00	0.36	

[Sources](#) [Serial/Lot](#) [Accounts](#) [Line Charges](#) [Line Text](#) [Line Approvals](#) [Currency Line](#) [Line Documents](#) [Proj Sub Parts](#) [Link SCI/SAP Security Codes](#) [Delivery Schedule](#)

Continue

[Manage Purchase Requisitions](#) [Accounts](#)

New Copy Delete Form Query

Requisition ID: 00-0002 Requisition Total: 28.36
Req Line: 1 Description: 1/4" TEST PLUG Quantity: 10 Req U/M: EA Total Est Cost Amt: 20.00

Project	Project Name	Proj Abbrev	Account	Account Name	Proj Acct Abbrev	Organization	Organization Name	Org Abbrev	Allocation	Allocated Amount	REF00001	REF00002
			00512-020	GOV'T - MEALS		1.1	Administration		100.00%	20.00		

Close

For the purpose of this overview, the Manage Purchase Requisitions (PPMNTRQ1) screen was used to present the general idea of the feature.

Login user organizations validate against the following highlighted fields, on the header, line, and line accounts when entering data on the Header tab.

Enter or select records authorized for your logged-in user ID's organization rights.

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Company 1 (Sample Env. Name 123 - C71MQC011Q1) Deltek Costpoint

Browse Applications > Materials > Procurement Planning > Purchase Requisitions > Manage Purchase Requisitions

Manage Purchase Requisitions / Apply PO Info to Requisitions

New Copy Delete 1 of 953 Existing Table Query

Identification

Requisition ID: 00-0002 Rev: 0 Approval Process: A Status: Approved Submit for Approval Trans Currency: USD

Header Accounting Defaults Other Information Notes Assign PO Defaults Security Requirements

Project: Account: 00512-020 Organization: 1.1 Inventory Abbrev: REF00001

Proj Abbrev: GOV'T - MEALS Administration Org Abbrev: REF00002

Requisition Lines

Req Line	Status	Line Type	Item	Item Rev	Misc Type	Description	Pa	Ship ID	Sales Tax/VAT Rate	Est Cost Type	Est Unit Cost Amt	Est Extended Cost Amt	Est Line Charge Amt	Est Sales Tax/VAT Amt	Tot Cos
1	Approved	P	100			1/4" TEST PLUG	Unrestricted		4.5000%		2.00	20.00	0.00	0.00	
2	Approved	S	001AJ	1		Pilot Instruction	N/A		4.5000%		0.00	8.00	0.00	0.36	

Line SOW Resources Serial/Lot Accounts Line Charges Line Currency Line Line Documents Proj Sub Parts Link SCI/SAP Security Codes Delivery Schedule

Continue

Manage Purchase Requisitions / Apply PO Info to Requisitions > Accounts

New Copy Delete Form Query

Requisition ID: 00-0002 Requisition Total: 28.36
Req Line: 1 Description: 1/4" TEST PLUG Quantity: 10 Req U/M: EA Total Est Cost Amt: 20.00

Project	Project Name	Proj Abbrev	Account	Account Name	Proj Acct Abbrev	Organization	Organization Name	Org Abbrev	Allocation	Allocated Amount	REF00001	REF00002
			00512-020	GOV'T - MEALS		1.1	Administration		100.00%	20.00		

Close

Login user organizations validate against the following highlighted fields, on the header, line, and line accounts when entering data on the Accounting Details tab.

Organization Security Overview

1 Apply Organization Security Setup

2 Populate Organizations

3 Validate Data Entries

4 Display Authorized Records

5 Query Authorized Records

6 Display Authorized Reports

FILE LINE OPTIONS PROCESS HELP Company 1 (Sample Env. Name 123 - C71MQC011Q1) Deltek Costpoint

Browse Applications > Materials > Procurement Planning > Purchase Requisitions > Manage Purchase Requisitions

Manage Purchase Requisitions / Apply PO Info to Requisitions

New Copy Delete 1 of 953 Existing Table Query

Requisition ID: 00-0002 Rev: 0 Approval Process: A Status: Approved Submit for Approval Trans Currency: USD

Header Accounting Defaults Other Information Notes Assign POs Security Requirements

Requisitioner: 1JEAN Organization: 1.1

Subcontractor Agreement Comb

Buyer

Sales Tax/VAT Total: 0.36 Req Total

Requisition Date: 03/13/2000 Target Place Date Date Entered: 03/13/2000 Buyer Assignment Date Procurement Type

Continue

3 Login to Costpoint and access the Manage Purchase Requisitions/Apply PO Info to Requisitions screen.

The screen defaults to the employee ID associated with the logged-in user ID and the home organization from the Manage Employee Information screen.

Requisition Lines

Req Line	Status	Line Type	Item	Item Rev	Misc Type	Description	Taxable	Ship ID	Sales Tax/VAT Rate	Est Unit Cost Amt	Est Extended Cost Amt	Est Line Charge Amt	Est Sales Tax/VAT Amt
1	Approved	P	100			1/4" TEST PLUG	No	SHIPIDTAX	4.5000%	2.00	20.00	0.00	0.00
2	Approved	S	001AJ	1		Pilot Instruction	Yes	SHIPIDTAX	4.5000%	0.00	8.00	0.00	0.36

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 Schedule

Manage Purchase Requisitions / Apply PO Info to Requisitions > Accounts

New Copy Delete Form Query

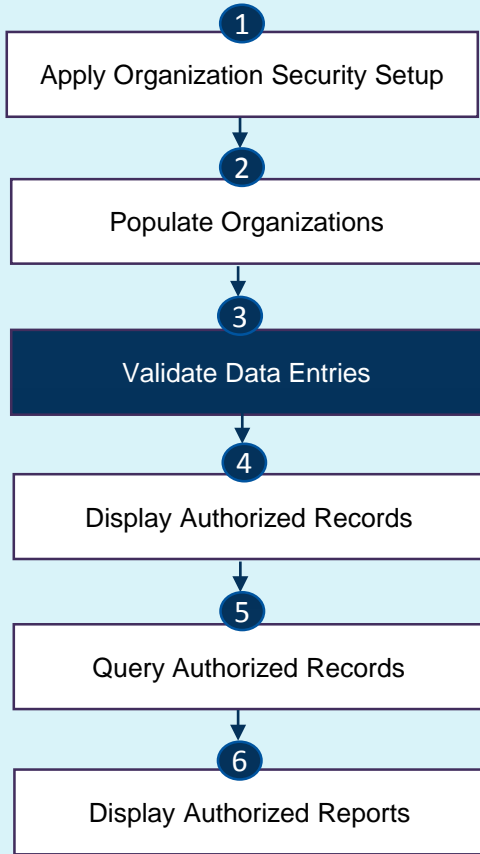
Requisition ID: 00-0002 Requisition Total: 28.36

Req Line: 1 Description: 1/4" TEST PLUG Quantity: 10 Req U/M: EA Total Est Cost Amt: 20.00

Project	Project Name	Proj Abbrev	Account	Account Name	Proj Acct Abbrev	Organization	Organization Name	Org Abbrev	Allocation	Allocated Amount	REF00001	REF00002
			00512-020	GOV'T - MEALS		1.1	Administration		100.00%	20.00		

Close

Organization Security Overview



FILE LINE OPTIONS PROCESS HELP Company 1 (Sample Env. Name 123 - C71MQC011Q1) Deltek Costpoint

Browse Applications > Materials > Procurement Planning > Purchase Requisitions > Manage Purchase Requisitions

Manage Purchase Requisitions / Apply PO Info to Requisitions

New Copy Delete 1 of 953 Existing Table Query

Requisition ID: 00-0002 Rev: 0 Approval Process: A Status: Approved Submit for Approval Trans Currency: USD

Header Accounting Defaults Other Information Notes Assign P... Security Requirements

Requisitioner * 1JEAN Archer7

Organization 1.1 Phon

Subcontractor Agreement Combine with Other Requisitions Requisition Printed

Buyer

Sales Tax/VAT Total 0.36 Req Total

Requisition Date * 03/13/2000

Target Place Date

Date Entered 03/13/2000

Buyer Assignment Date

Procurement Type

Continue

When you change the organization and the requisitioner, your logged-in user ID should have access to the organization ID and to the requisitioner's organization ID. However, if the requisitioner's employee ID is linked to multiple user IDs and one of those user IDs has full rights, then it will pass system validation.

Requisition Lines

Req Line *	Status	Line Type	Item	Item Rev	Misc Type	Description
1	Approved	P	100			1/4" TEST PLUG
2	Approved	S	001AJ	1		Pilot Instruction

Line SOW Resources Serial/Lot

Manage Purchase Requisitions / Apply PO Info to Requisitions > Accounts

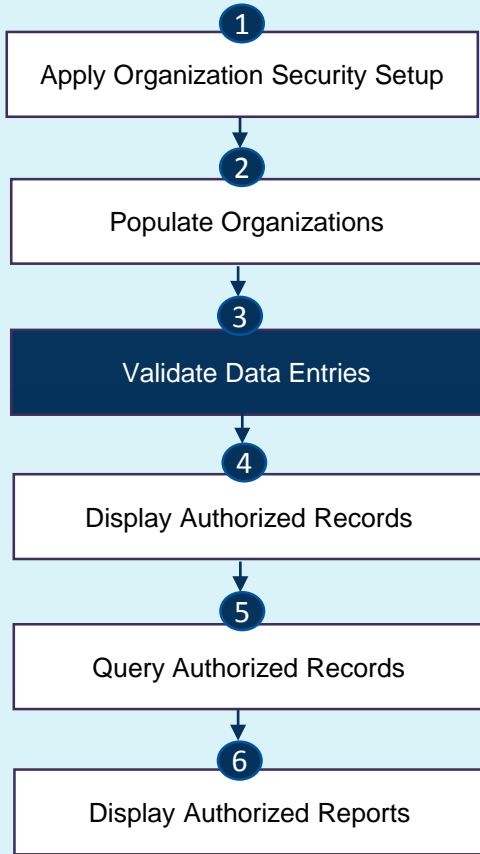
Requisition ID: 00-0002 Requisition Total: 28.36

Req Line: 1 Description: 1/4" TEST PLUG Quantity: 10 Req U/M: EA Total Est Cost Amt: 20.00

Project	Project Name	Proj Abbrev	Account	Account Name	Proj Acct Abbrev	Organization	Organization Name	Org Abbrev	Allocation	Allocated Amount	REF00001	REF00002
			00512-020	GOV'T - MEALS		1.1	Administration		100.00%	20.00		

Close

Organization Security Overview



FILE LINE OPTIONS PROCESS HELP

Company 1 Delttek Costpoint

Browse Applications > Materials > Procurement Planning > Purchase Requisitions > Manage Purchase Requisitions

Manage Purchase Requisitions / Apply PO Info to Requisitions

New Copy Delete Approval 1 of 1 New Table Query

Identification

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

Header Accounting Defaults Other Information Notes Assign

Requisitioner

Requisitioner* ASAKA Asaka, Organization 1.2.210 Phone Requisition Date* 08/05/2018 Target Place Date Date Entered 08/05/2018 Buyer Assignment Date Procurement Type

Subcontractor Agreement Combine with Other Requisitions Requisition Printed

Buyer Sales Tax/VAT Total 0.00 Req Total

Continue

Click **New** to create a new requisition.

When you click **New**, the requisitioner's organization that you enter must be authorized for your logged-in user ID. Otherwise, Costpoint will display an error message.

Hdr Approvals Totals Exchange Rates Hdr Documents Link SCI/SAP Security Codes

Requisition Lines

Req Line*	Status	Line Type	Item	Item Rev	Misc Type	Description	Part Security	Date*	U/M	Quantity	Inv Abbrev	Taxable	Ship ID	Sales Tax/VAT Rate	Est Cost Type	Est Unit Cost Amt	Est Extended Cost Amt	Est Li Charge

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 Schedule

Organization Security Overview

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Populate Organizations

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FILE LINE OPTIONS PROCESS HELP

Company 1 Deltek Costpoint

Browse Applications > Materials > Procurement Planning > Purchase Requisitions > Manage Purchase Requisitions

Manage Purchase Requisitions / Apply PO Info to Requisitions

Identification

Requisition ID: [] Rev: []

Header Accounting Defaults Other Information Notes Assign

Requisitioner

Requisitioner*: ASAKA Asaka, Leslie S C.P.A.

Organization: 1.2.210

Phone: [] Extension: []

Submit for Approval: [] Trans Currency: USD

Requisition Date*: 08/05/2018

Target Place Date: []

Date Entered: 08/05/2018

Buyer Assignment Date: []

Procurement Type: []

Subcontractor Agreement: []

Buyer: []

Sales Tax/VAT Total: []

Lookup

Organization	Abbreviation	
0	K&K EN	Karen B
0.2	K&K2	Karen B
1	DELTEK	SuperTech, Inc_711rm
1.1	1	711rm Administration
1.1. 1		space
1.1.100	100	Accounting
1.1.100.000000000001		fourth level
1.1.110		Payroll
1.1.111		Test 1112
1.1.115		Quality Control SubA
1.1.116		Quality Control Sub B
1.1.117	TESTI	Quality Control Sub Cx
1.1.118	TESTFY	Quality Control Sub Dx
1.1.119	TESTPD	Quality Control Sub Ex

Requisition Lines

Req Line*	Status	
[]	[]	[]

Text Hdr Approvals Totals Exchange Rates Hdr Documents Link SCI/SAP Security Codes

New Copy Delete Form Query

Quantity Inv Abbrev Taxable Ship ID Sales Tax/VAT Rate Est Cost Type Est Unit Cost Amt Est Extended Cost Amt Est Li Charge

Currency Line Line Documents Proj Sub Parts Link SCI/SAP Security Codes Delivery Schedule

Select Cancel

4 Click the lookup icon to display organizations that are authorized for your logged-in user ID.

Continue

If the **Apply Org Security** for user profile associated to the user group of the logged-in user is not selected, all organizations can be accessed by the user.

Organization Security Overview

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FILE LINE OPTIONS PROCESS HELP

Company 1 Deltak Costpoint

★ 1 Browse Applications > Materials > Procurement Planning > Purchase Requisitions > Manage Purchase Requisitions

→ Manage Purchase Requisitions / Apply PO Info to Requisitions

New Copy Delete Approval 1 of 1 New Table Query

Identification

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

Header Accounting Defaults Other Information Notes Assign PO Defaults Security Requirements

Project

Account Lookup

Organization

Inventory Abbrev REF00001

Project	Abbrev	Project Name	Start Date	End Date
0001		test		
0001.0000000001		Erika Project		
0001.0000000002		Erika Project		
0100	YRL	YVONNES PROJECT1 %	01/01/2007	12/31/2011
0100.001	ICP	ffff		
0200	B&P	PHelp Project - B&P	01/01/2000	05/12/2024
0200.001		PHelp Project - 2nd level		
0300	CPFFTL	PHelps Project - CPFF/TL	09/01/1996	09/30/2005
0300.001	CPFFR1	PHelps Project-R1 CPFF/TL		
0300.002	CPFFR2	PHelps Project-R2-CPFF/TL		
0400	T&MTLB	PHelps Project - T&M/TLB	04/01/1995	12/31/2020
0400.001	T&MT1	PHelps Project T1-T&M/TLB	04/01/1996	
0400.002	T&MT2	PHelps Project T2-T&M/TLB	02/01/1997	02/28/2000
0400.002.01	T&MTS1	PHelps ProjectTS1-T&M/TLB		

Requisition Lines

Reg Line*	Status

4

Click the lookup icon to display projects with owning organizations that are authorized for your logged-in user ID.

If the **Apply Org** Security for user profile associated to the user group of the logged-in user is not selected, All organizations can be accessed by the user.

Continue

Select Cancel

Organization Security Overview

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Click **Query** to display records based on your organization rights for the organization and project at the header level.

All requisition lines can be viewed, edited, and deleted by the logged-in user. Line filtering can be applied via extensibility feature. However, new lines will be validated to ensure that these are authorized for the organization.

Continue

FILE LINE OPTIONS PROCESS HELP

Company 1 Deltek Costpoint

Browse Applications > Materials > Procurement Planning > Purchase Requisitions > Manage Purchase Requisitions

Manage Purchase Requisitions / Apply PO Info to Requisitions

New Copy Delete Approval 1 of 1 New Table Query

Submit for Approval Trans Currency USD

Exchange Rates Hdr Documents Link SCI/SAP Security Codes

Ship ID Sales Tax/VAT Rate Est Cost Type Est Unit Cost Amt Est Extended Cost Amt Est Line Charge Amt T

Proj Sub Parts Link SCI/SAP Security Codes Delivery Schedule

Manage Purchase Requisitions / Apply PO Info to Requisitions

Find Query Sort Saved Queries

Search Criteria

Requisition ID begins with 0000

Requisitioner begins with

2 records will be returned Count Save Query Reset

Find Close

Organization Security Overview

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Display Authorized Reports



ABCDEFGHIJKLMNOPQRSTUVWXYZ_MAXXXXXXXXXXend Purchase Requisition Approval Status Report By Requisition

Page 1 of 22
12/21/17
07:11 AM

Requisition: DRS-000037 Rev: 0 Date: 06/23/16 Status: In-Approval Estimated Amount: \$ 8.00 Appr Process: JEFTEST
Org: 1.2.210 Phone: 777-888888 999999

Line	Rev	Item/ Description	Item Rev	Status	U/M	Requested Qty	Est Unit Cost	Ext Amt/ Line Charges	Tax	Total Line Amount
------	-----	----------------------	-------------	--------	-----	---------------	---------------	--------------------------	-----	----------------------

Requisition not printed - Your user ID is not authorized for the Requisitioner's Org on this requisition.

6

Click **Print or Preview** to print or preview a report of records authorized for your logged-in user ID.

Continue

Unauthorized records will be suppressed and will not be displayed in the report.

Requisition: DRS-000037 Rev: 0 Date: 06/23/16 Status: In-Approval Estimated Amount: \$ 5,000.00 Appr Process: EAO
Org: 1.2.210 Phone: 777-888888 999999

Line	Rev	Item/ Description	Item Rev	Status	U/M	Requested Qty	Est Unit Cost	Ext Amt/ Line Charges	Tax	Total Line Amount
------	-----	----------------------	-------------	--------	-----	---------------	---------------	--------------------------	-----	----------------------

1		0 P070116 EAO		I	EA	100	\$ 50.00	\$ 5,000.00 N \$ 0.00		\$ 5,000.00
---	--	------------------	--	---	----	-----	----------	--------------------------	--	-------------

Approval Rev	Seq	Approval Title	Approval Status	Action Date	Employee	User ID	Rej Reason
0	1	EAO1	Pending				

Organization Security Overview

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FILE LINE OPTIONS PROCESS HELP Applied Technologies Inc 1 (Environment Name - C71T10B7QER) Deltek Costpoint

Browse Applications > Admin > System Administration > System Administration Controls > Configure System Settings

System Settings

Company Settings Batch Job Case Reporting

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

☒ Allow HR Org Manager/Rep from Other Companies Environment Name Environment Name

Email System

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

SMTP Server User ID Password

E-mail Redirect

☐ Require SSL / TLS

Company Defaults

☒ Print Cover Page

Costpoint User Accounts

☒ Auto-create User Accounts

Authentication Method Single Sign-on or Active Directory ☒ Allow Employee Override

Preferred Notification Method Email

Default Settings

Default Page Size

Page Size -None- Unit of Measure Inches Page Height Page Width

Top Margin Bottom Margin Left Margin Right Margin

Default Font Arial Narrow

Default Locale * en_US English (United States) ☒ Print Currency Symbol

Company Logo

Footer Label

This concludes the Organization Security Overview click-thru.