

Organization Security Overview

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Apply Organization Security Setup

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Populate Organizations

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Validate Data Entries

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Display Authorized Records

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Query Authorized Records

6

Display Authorized Reports

Applied Technologies Inc 1 (Environment Name - C71T10B7QER) Delttek 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 O

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

Begin

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.

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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

- 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

- Costpoint User Accounts

Auto-create User Accounts

Authentication Method: Sign | Employee Override

Preferred Notification Method: Em

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 | Print Currency Symbol

Company Logo

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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Applied Technologies Inc1 (Environment Name - C71T10B7QER) Deltek Costpoint

FILE LINE OPTIONS PROCESS HELP

Browse Applications > Admin > Security > Organizational Security > Activate/Inactivate Organization Security by Module

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"/>

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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FILE LINE OPTIONS PROCESS HELP Applied Technologies Inc1 (Environment Name - C71T10B7QER) Deltak Costpoint

Browse Applications > Admin > Security > Organizational Security > Activate/Inactivate Organization Security by Module

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) Delttek Costpoint

Organization Security Profiles

Organization Security Profile

Profile ID *

Apply Org Security

Assign Organizations to Profile

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

Continue

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.

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.

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.

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

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Organization Security Profile

Profile ID * Name *

Apply Org Security Rights Application Method Inclusive Exclusive Both

Assign Organizations to Profile

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

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

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.

Continue

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

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Organization Security Profile

Profile ID * Name *

Apply Org Security Inclusive Exclusive Both

Assign Organizations to Profile

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

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

Continue

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Organization Security Profile

New Copy Delete Form Query

<input checked="" type="checkbox"/>	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

New Copy Delete Query

<input checked="" type="checkbox"/>	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.

Continue



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

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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FILE LINE OPTIONS PROCESS HELP

Company 1 (Sample Env. Name 123 - C71MQCO11Q1) Deltek Costpoint

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

Organization Security Profile

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

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.

Continue



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

Organization Security Group

New Copy Delete 1 of 1 New Table Query

Organization Security Group * Name *

Organization Security Profile to Assign

Assign Profiles To Modules

<input checked="" type="checkbox"/>	Module	Module Description	Organization Security Profile *	Prof

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

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.

Continue

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.

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Applied Technologies Inc1 (Reskin env - C71T10B7PSM17LAB) Deltek Costpoint

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

User Groups

U			
ACCTPAY			
ALL	ALL		
B&P			
CER_AC			
CER_AD			
CER_AD			

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.

User Groups > Assign Users to Group

User *	Name
1002	
1006	Carr,Linda

Continue

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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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

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Applied Technologies Inc1 (Reskin env - C71T10B7PSM17LAB) > Deltek Costpoint >

FILE LINE OPTIONS PROCESS HELP

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

Identification

Parameter ID * Update Org Security Profiles Description *

(Batch Mode)
Update Org Security Profiles

Show/Hide Screen Controls

New Copy Delete 1 of 1 New Table Query

Selection Ranges

Profile	Option	Start	End
---------	--------	-------	-----

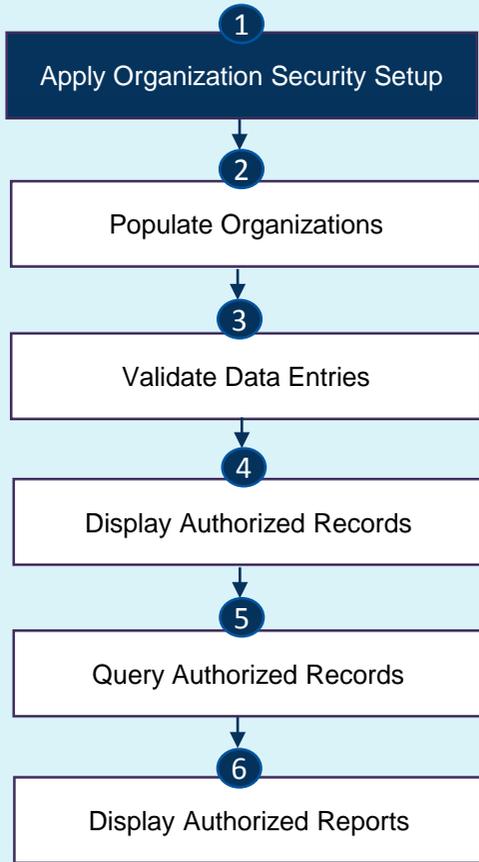
1 Run this application either after setting up all organizational profiles or any time you add an organization or change and/or add a profile. Run this for all profiles when first setting up organizational security and when using the range feature for maintenance.

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.

Organization Security Overview



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

Reload Settings

Reload Global 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 Benefits
1	one	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4TEST2	test	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AAA	AAAAA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
APP	app	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
APPURVR	APPURVR	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AWE	AWE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CC	cc	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
RTEST	Rain Test Defa	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
RTEST2	RTEST2 INDV	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>				
RTEST3	RTEST3 SYS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
RTEST4	RTEST4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SH	RELOAD TEST	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SS	ss	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TEST	test	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TEST1	test	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TEST2	test	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TEST3	test	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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.

Continue

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FILE LINE OPTIONS PROCESS HELP

Browse Applications > Procurement Planning Utilities > Load Organization IDs

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

Parameter ID * Description *

This utility will allow users to populate 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

Continue

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

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.

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

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

FILE LINE OPTIONS PROCESS HELP

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

Manage Purchase Requisitions / Apply PO Info to Requisitions

1 of 963 Existing

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

Header Accounting Defaults Other Information Notes Assign PO

Requisitioner: 1JEAN Archer7890112345XXXXXXXXXX

Organization: 1.1 Phone: [] Extension: []

Buyer: []

Subcontractor Agreement [] Combined []

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: []

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.

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

Continue

Req Line*	Stat	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
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	

Manage Purchase 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	GOVT - MEALS		1.1	Administration		100.00%	20.00		

Close

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

FILE LINE OPTIONS PROCESS HELP

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

Manage Purchase Requisitions / Apply PO Info to Requisitions

New Copy Delete 1 of 863 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: Proj Abbrev:
 Account: 00512-020 GOV'T - MEALS Proj Acct Abbrev:
 Organization: 1.1 Administration Org Abbrev:
 Inventory Abbrev:
 REF00001 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	Unrestrict		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 Continue Currency Line Line Documents Proj Sub Parts Link SCI/SAP Security Codes Delivery Schedule

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

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

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

FILE LINE OPTIONS PROCESS HELP

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

Manage Purchase Requisitions / Apply PO Info to Requisitions New Copy Delete 1 of 963 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 P... Security Requirements

- Requisitioner
 Requisitioner*: 1JEAN Archer7
 Organization: 1.1 Phon...
 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

Requisition Lines New Copy Delete Form Query

Req Line*	Status	Line Type	Item	Item Rev	Misc Type	Description	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
1	Approved	P	100			1/4' TEST PLUG		4.5000%		2.00	20.00	0.00	0.00
2	Approved	S	001AJ	1		Pilot Instruction		4.5000%		0.00	8.00	0.00	0.36

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

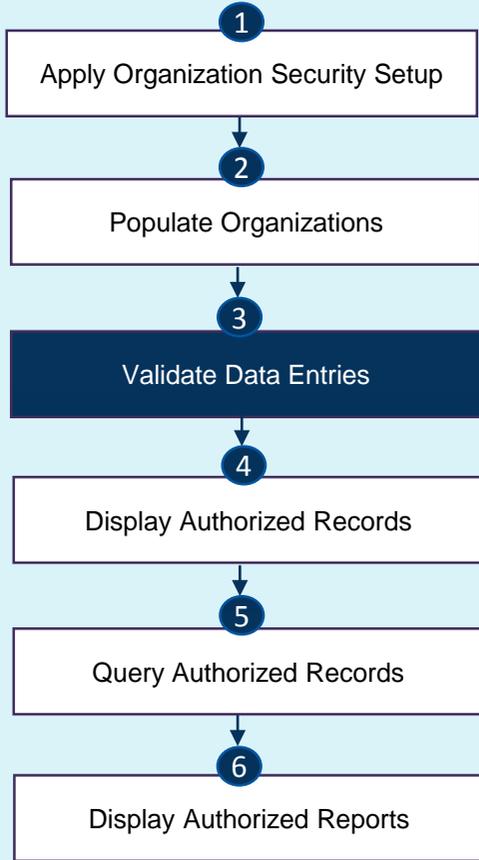
Project	Project Name	Proj Abbrev	Account	Account Name	Proj Acct Abbrev	Organization	Organization Name	Org Abbrev	Allocation	Allocated Amount	REF00001	REF00002
			00512-020	GOVT - MEALS		1.1	Administration		100.00%	20.00		

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

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

Close

Organization Security Overview



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

1 of 963 Existing

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

3 Change the organization and requisitioner values.

Continue

Requisitioner: 1JEAN | Organization: 1.1

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

Buyer: | Sales Tax/VAT Total: 0.36 | Req Total: |

Subcontractor Agreement: | Combine with Other Requisitions: | Requisition Printed:

Req Line 1: Approved | P | 100 | 1/4' TEST PLUG

Req Line 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	GOVT - MEALS		1.1	Administration		100.00%	20.00		

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.

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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

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 []
 Subcontractor Agreement Combine with Other Requisitions Requisition Printed
Buyer []
Sales Tax/VAT Total 0.00 Req Total []

Requisition Date* 08/05/2018
Target Place Date []
Date Entered 08/05/2018
Buyer Assignment Date []
Procurement Type []

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

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FILE LINE OPTIONS PROCESS HELP

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

Submit for Approval [] Trans Currency: USD

Requisition Date*: 08/05/2018
 Target Place Date: []
 Date Entered: 08/05/2018
 Buyer Assignment Date: []
 Procurement Type: []

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		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				
1.1.100		100	Accounting	1	✓
1.1.100.000000000001			fourth level	1	✓
1.1.110			Payroll	1	✓
1.1.111			Test 1112	1	✓
1.1.115			Quality Control SubA	1	✓
1.1.116			Quality Control Sub B	1	✓
1.1.117		TESTI	Quality Control Sub Cx	1	✓
1.1.118		TESTFY	Quality Control Sub Dx	1	✓
1.1.119		TESTPD	Quality Control Sub Ex	1	✓

Continue

Click the lookup icon to display 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.

Select Cancel

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Company 1 | Deltek Costpoint

FILE LINE OPTIONS PROCESS HELP

★ 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 [Lookup Icon]

Account Lookup Query

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

Req 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

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The screenshot shows the SAP 'Manage Purchase Requisitions / Apply PO Info to Requisitions' interface. A search dialog is open, displaying search criteria for Requisition ID and Requisitioner. The Requisition ID field is set to 'begins with' and '0000'. The Requisitioner field is set to 'begins with' and is empty. The dialog shows '2 records will be returned' and includes buttons for 'Find', 'Close', 'Count', 'Save Query', and 'Reset'. A yellow box highlights the 'Query' button in the background interface.

5

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.

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ABCDEFGHIJKLMNOPQRSTUVWXYZ_MAXXXXXXXend Purchase Requisition Approval Status Report By Requisition

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: 0P070116 Status: In-Approval Estimated Amount: \$ 5,000.00 Appr Process: EAO
Org: 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		0P070116 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				

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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.