
PeopleSoft FSCM 9.2: Proposal Management

March 2013

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Preface

Understanding the PeopleSoft Online Help and PeopleBooks

The PeopleSoft Online Help is a website that enables you to view all help content for PeopleSoft Applications and PeopleTools. The help provides standard navigation and full-text searching, as well as context-sensitive online help for PeopleSoft users.

PeopleSoft Hosted Documentation

You access the PeopleSoft Online Help on Oracle's PeopleSoft Hosted Documentation website, which enables you to access the full help website and context-sensitive help directly from an Oracle hosted server. The hosted documentation is updated on a regular schedule, ensuring that you have access to the most current documentation. This reduces the need to view separate documentation posts for application maintenance on My Oracle Support, because that documentation is now incorporated into the hosted website content. The Hosted Documentation website is available in English only.

Locally Installed Help

If your organization has firewall restrictions that prevent you from using the Hosted Documentation website, you can install the PeopleSoft Online Help locally. If you install the help locally, you have more control over which documents users can access and you can include links to your organization's custom documentation on help pages.

In addition, if you locally install the PeopleSoft Online Help, you can use any search engine for full-text searching. Your installation documentation includes instructions about how to set up Oracle Secure Enterprise Search for full-text searching.

See *PeopleTools 8.53 Installation* for your database platform, "Installing PeopleSoft Online Help." If you do not use Secure Enterprise Search, see the documentation for your chosen search engine.

Note: Before users can access the search engine on a locally installed help website, you must enable the Search portlet and link. Click the Help link on any page in the PeopleSoft Online Help for instructions.

Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format. The content in the PeopleBook PDFs is the same as the content in the PeopleSoft Online Help, but it has a different structure and it does not include the interactive navigation features that are available in the online help.

Common Help Documentation

Common help documentation contains information that applies to multiple applications. The two main types of common help are:

- Application Fundamentals

- Using PeopleSoft Applications

Most product lines provide a set of application fundamentals help topics that discuss essential information about the setup and design of your system. This information applies to many or all applications in the PeopleSoft product line. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of the appropriate application fundamentals help. They provide the starting points for fundamental implementation tasks.

In addition, the *PeopleTools: PeopleSoft Applications User's Guide* introduces you to the various elements of the PeopleSoft Pure Internet Architecture. It also explains how to use the navigational hierarchy, components, and pages to perform basic functions as you navigate through the system. While your application or implementation may differ, the topics in this user's guide provide general information about using PeopleSoft Applications.

Field and Control Definitions

PeopleSoft documentation includes definitions for most fields and controls that appear on application pages. These definitions describe how to use a field or control, where populated values come from, the effects of selecting certain values, and so on. If a field or control is not defined, then it either requires no additional explanation or is documented in a common elements section earlier in the documentation. For example, the Date field rarely requires additional explanation and may not be defined in the documentation for some pages.

Typographical Conventions

The following table describes the typographical conventions that are used in the online help.

| <i>Typographical Convention</i> | <i>Description</i> |
|--|--|
| Bold | Highlights PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call. |
| <i>Italics</i> | Highlights field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. Italics also highlight references to words or letters, as in the following example: Enter the letter <i>O</i> . |
| Key+Key | Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For Alt+W, hold down the Alt key while you press the W key. |
| Monospace font | Highlights a PeopleCode program or other code example. |
| ... (ellipses) | Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax. |

| <i>Typographical Convention</i> | <i>Description</i> |
|--|--|
| { } (curly braces) | Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (). |
| [] (square brackets) | Indicate optional items in PeopleCode syntax. |
| & (ampersand) | When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables. |
| ⇒ | This continuation character has been inserted at the end of a line of code that has been wrapped at the page margin. The code should be viewed or entered as a single, continuous line of code without the continuation character. |

ISO Country and Currency Codes

PeopleSoft Online Help topics use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

ISO country codes may appear as country identifiers, and ISO currency codes may appear as currency identifiers in your PeopleSoft documentation. Reference to an ISO country code in your documentation does not imply that your application includes every ISO country code. The following example is a country-specific heading: "(FRA) Hiring an Employee."

The PeopleSoft Currency Code table (CURRENCY_CD_TBL) contains sample currency code data. The Currency Code table is based on ISO Standard 4217, "Codes for the representation of currencies," and also relies on ISO country codes in the Country table (COUNTRY_TBL). The navigation to the pages where you maintain currency code and country information depends on which PeopleSoft applications you are using. To access the pages for maintaining the Currency Code and Country tables, consult the online help for your applications for more information.

Region and Industry Identifiers

Information that applies only to a specific region or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a region-specific heading: "(Latin America) Setting Up Depreciation"

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in the PeopleSoft Online Help:

- Asia Pacific
- Europe
- Latin America

- North America

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in the PeopleSoft Online Help:

- USF (U.S. Federal)
- E&G (Education and Government)

Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

Using and Managing the PeopleSoft Online Help

Click the Help link in the universal navigation header of any page in the PeopleSoft Online Help to see information on the following topics:

- What's new in the PeopleSoft Online Help.
- PeopleSoft Online Help accessibility.
- Accessing, navigating, and searching the PeopleSoft Online Help.
- Managing a locally installed PeopleSoft Online Help website.

PeopleSoft FSCM Related Links

Financial and Supply Chain Management information for Secure Enterprise Search (SES) can be found in PeopleSoft Application Fundamentals documentation. For application specific information, see the "Understanding Search Pages within Components (*PeopleSoft FSCM 9.2: Application Fundamentals*)" topic.

[My Oracle Support](#)

[PeopleSoft Information Portal on Oracle.com](#)

[PeopleSoft Training from Oracle University](#)

[PeopleSoft Video Feature Overviews on YouTube](#)

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Send us your suggestions Please include release numbers for the PeopleTools and applications that you are using.

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Getting Started With PeopleSoft Proposal Management

PeopleSoft Proposal Management Overview

At any time in your business cycle, your organization may be faced with many service-related opportunities. Organizations must make informed decisions about which opportunities to pursue based on estimated cost and potential revenue. In addition, each opportunity may have multiple viable scenarios for execution, with each having its own estimated costs.

In PeopleSoft Proposal Management, professional services organizations typically use proposals to estimate what resources are required to pursue an initiative or potential service contract that is not yet accepted. With PeopleSoft Proposal Management, you have the ability to:

- Create multiple projects for a proposal.
- Generate proposals from quotes in Order Capture.
- Create contracts and contract lines from proposals.
- Copy proposal versions to new versions within a proposal or to new proposals.
- Pass proposed rates to the Activity Resource List (ARL) for billing.
- Control access to proposals using security that is based on user ID and department.
- View overall proposal cost and billing information.
- Store and view relevant files, such as requests for proposals and terms and conditions.

Each proposal may have several different ways to approach the opportunity, provide services for the proposal, or sell it to your client. For example, you might be presented with a project that could be done in a number of different ways. Or you might want to create different versions to highlight the different costs between completing an assignment in a short time frame using many resources and completing the same assignment in a longer time frame with fewer resources. By creating several versions of the same proposal, you can look at the problem from different angles and come up with a solution that is best for you and your client.

You can use PeopleSoft Proposal Management to easily generate multiple proposal versions to find the situation that best fits your business needs. Creating a detailed proposal for services involves outlining activities, time lines, resource needs, cost amounts, bill amounts, and margin percentages. To be responsive to customers and reduce costs, it is essential that you leverage the work that went into the original proposal when creating a contract and projects for a customer. After a proposal is accepted, organizations must move quickly from the sales mode to the execution mode.

The proposal that is accepted by the customer serves as a basis for generating the contract. You can convert all the cost, revenue, billing terms, resource asset, material or other cost rates and resource, asset,

material, or other bill rates, into a contract that can be used to bill the customer and recognize revenue. This capability eliminates redundant data entry, increases accuracy, and reduces bill discrepancies.

Just as the proposal terms and conditions form the basis of the contract, project plans that are associated with the proposal are used to generate projects. This eliminates the need to recreate critical project information, such as the project activities, time lines, resource requirements, and project teams.

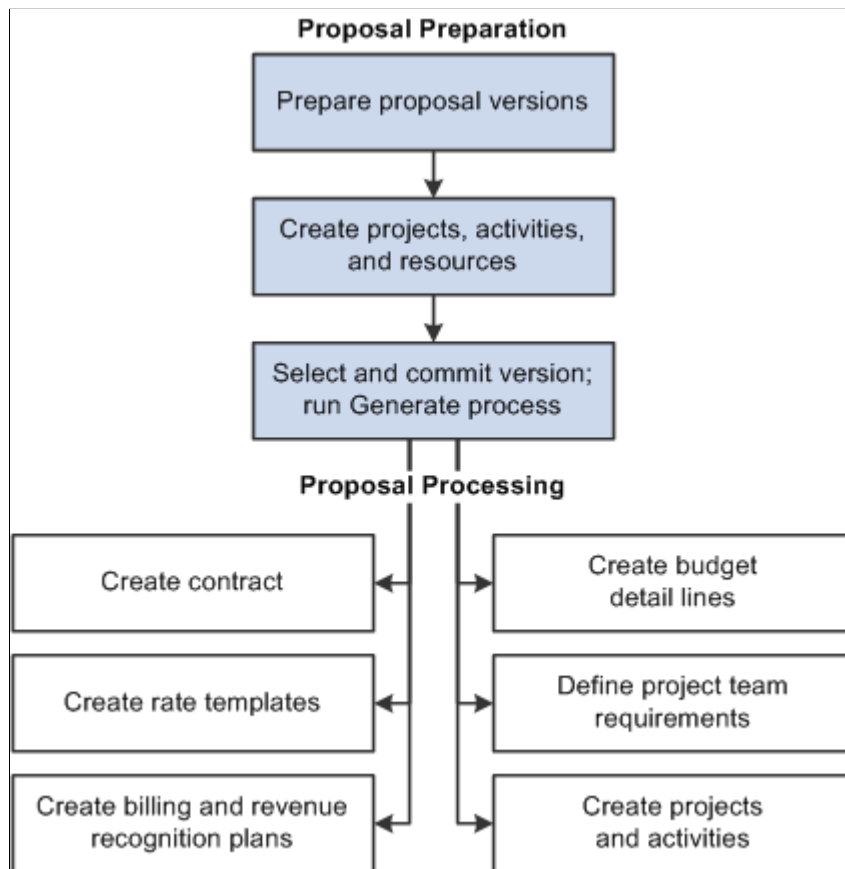
PeopleSoft Proposal Management gives you the ability to develop and administer project proposals to expedite the closure of business opportunities and to reuse proposal versions for future engagements.

Note: To use all of the PeopleSoft Proposal Management functionality, you must also purchase PeopleSoft General Ledger, PeopleSoft Project Costing, PeopleSoft Program Management, PeopleSoft Contracts, Resource Management, and PeopleSoft Billing. The minimum requirements to use PeopleSoft Proposal Management include the purchase of PeopleSoft Project Costing and PeopleSoft Contracts.

Life Cycle of a Proposal

Image: Proposal life cycle

This diagram shows a high-level view of proposal preparation and processing, beginning with preparing the proposal versions, defining your projects, activities and resources, and then generating the proposal and managing the project through its life cycle.



During proposal preparation, you can create as many proposal versions as needed and as many projects as needed for each version.

If you want to begin defining resource requirements for a project before those requirements are approved to incur costs against the project, you can optionally create a project resource team by selecting the

Create Resources Team check box on the Maintain Version Estimate Detail page. This creates a project in a Pending processing status in PeopleSoft Project Costing. The Create Resources Team process only reserves the labor resource. In PeopleSoft Proposal Management, you can jump to the project from the project ID link on the Resource Estimate page and the Maintain Version Estimate Detail page or the Resource Team link on the Maintain Version Estimate Detail page. In PeopleSoft Program Management, you can reserve, but not assign, resources to a pending project. The reservations appear on the resource's schedule in Resource Management.

If you select a different proposal version after the resource team is created (but before the Pre-Spending process is run), the system deletes any existing pending projects, project team structures, and activity team structures for the versions that were created for previously selected versions.

If you want to start incurring costs against a proposal before it is approved, you can optionally run the Pre-Spending process. This process creates projects and activities in PeopleSoft Project Costing without creating a contract. The difference between creating projects using the Pre-Spending process and creating projects by selecting the Create Resources Team check box on the Maintain Version Estimate Detail page is that the Pre-Spending process creates projects in an Active processing status.

If you previously created a pending project by selecting the Create Resources Team check box, the Pre-Spending process changes the processing status of projects on the current version from Pending to Active. The Pre-Spending process changes the generate status on the Maintain Proposal page to Pre-Sales Spending. You can still modify and add projects to the current version after you run the Pre-Spending process. You are, however, locked in on the version on which Pre-Spending was run.

You can run the Contract Generation process when the proposal status is Committed. This process generates the proposal into its various revenue and project tracking tables in PeopleSoft Contracts and PeopleSoft Project Costing. You can select only one version of a proposal for contract generation.

Common Elements Used in Proposal Management topics

| | |
|-----------------------|---|
| Account | ChartField that identifies the nature of a transaction for corporate accounts. This is a delivered PeopleSoft ChartField, specific use of which is typically defined by your organization during implementation of PeopleSoft General Ledger. |
| Activity | The unit of work in PeopleSoft Project Costing that provides a further breakdown of projects, usually into specific tasks. Resources are assigned directly to activities within a project, rather than being assigned directly to projects. |
| Analysis Type | A three-character, user-definable identifier that enables you to label the different types of costs in PeopleSoft Project Costing. For example, you might want to track budgeted costs (BUD), committed costs (COM), and actual costs (ACT). |
| Currency | Code that identifies the type of currency for an amount, such as USD (United States Dollar) or EUR (Euro). |
| Department | ChartField that indicates who is responsible for or affected by the transaction. |
| Effective Date | Date on which a table row becomes effective; the date that an action begins. For example, if you want to close out a ledger on June 30th, the effective date for the ledger closing would |

| | |
|---|---|
| | be July 1st. This date also determines when you can view and change the information. Pages and batch processes that use the information use the current row. |
| EIP (enterprise integration point)enterprise integration point (EIP), definition | An EIP is an instance of enterprise integration between your PeopleSoft application and an external system or application: a seamless connection between the two products to accomplish a specific business purpose. EIPs represent the formal methods that third-party applications use to exchange data elements. |
| Operating Unit | ChartField that is used to identify a location, such as a distribution warehouse or sales center. |
| Process Monitor | <p>This is a PeopleSoft tool that you can use to review the status of scheduled or running processes. You can view all processes to see the status of any job in the queue and control processes that you initiated.</p> <p>See <i>PeopleTools: PeopleSoft Process Scheduler</i>, "Understanding PeopleSoft Process Scheduler."</p> |
| Product | ChartField that captures additional information useful for profitability and cash flow analysis by product sold or manufactured. |
| Program | ChartField that identifies groups of related activities, cost centers, revenue centers, responsibility centers, and programs. Tracks revenue and expenditures for programs. |
| Project | <p>The highest level of hierarchical organization within PeopleSoft Project Costing. PeopleSoft Project Costing provides the structure to which activities and resources are added.</p> <p>Proposal projects obtain their numbering from PeopleSoft Project Costing. This ensures continuity with the numbering process when the proposal project becomes a real project. The numbering process occurs when you run the generate process, request pre-award spending, or create the project team.</p> |
| Contract | <p>A contract is a legal agreement between two or more parties. This is the highest level entity within the PeopleSoft Contracts module. Proposal numbering is obtained from PeopleSoft Contracts and a proposal becomes a contract after you run the generate process.</p> |
| Proposal | A comprehensive estimate provided to a prospect or customer that contains projects, activities, resources, labor, assets, materials, and other projections. The proposal also includes a time frame for the proposed work. A proposal can contain multiple versions for modeling different scenarios prior to finalizing and running the generate process. You can run the generate process only once on the current version of a proposal. |

| | |
|-----------------------------|--|
| Proposal ID | A unique number that is assigned by PeopleSoft Contracts to track the proposal throughout the proposal development and Contract Generation process. This ID is derived from the PeopleSoft Contracts auto numbering process and remains the same after the Contract Generation process so that the proposal and the contract contain the same ID. |
| Report ID | The report identifier. |
| Resource Transaction | Displays an individual cost or bill row within PeopleSoft Project Costing. It is through resource transactions that individual costs and types of costs are tracked. Each resource transaction contains a cost, bill, and quantity, and other identifiers of the cost that may have been entered. Resource transactions are created when you receive information from other systems, run allocations with project resources as the target, or perform internal transactions such as billing, project closure, or adjustments. |
| Resource Type | The Resource Transaction field in PeopleSoft Project Costing that identifies the resource associated with a given cost. Resource types may be general or specific depending on your needs; they are used in conjunction with resource categories, resource subcategories, and resource groups. |
| Run | This button takes you to the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format. See <i>PeopleTools: PeopleSoft Process Scheduler</i> , "Understanding PeopleSoft Process Scheduler." |
| Run Control ID | Code that identifies the run parameters for a report or process. |
| SetID | Code that represents a set of control table information or tablesets. A tableset is a group of tables (records) necessary to define your company's structure and processing options. |
| Status | In PeopleSoft Proposal Management, status is also used to indicate the state of the proposal. The statuses used in PeopleSoft Proposal Management include: <i>Draft</i> , <i>Ready</i> , <i>Denied</i> , <i>Committed</i> , and <i>Canceled</i> . |
| Version | To track different scenarios, we support multiple versions of proposals. Note that users can select only one version (the current version) for sale. The other versions would, however, still be visible. Basic information, such as the proposal description, start and end dates, customer information, and contacts, remain the same for each version. To create a different version of a proposal, |

users enter resource details for the projects and activities that they want to associate with the proposal.

PeopleSoft Proposal Management Business Processes

Image: Proposal Management Business Processes

This graphic lists the PeopleSoft Proposal Management business processes.

| | | |
|---|--------------------------------|-------------------|
| Proposal Preparation | Labor and Non-labor Estimation | Version Modeling |
| Generate Process | Budgeting* | Project Analysis* |
| Bill Creation* | Reporting | Proposal Copy |
| *These business processes are a part of the Proposal Management life cycle; however, they are administered by Contracts, Project Costing, and Program Management. | | |

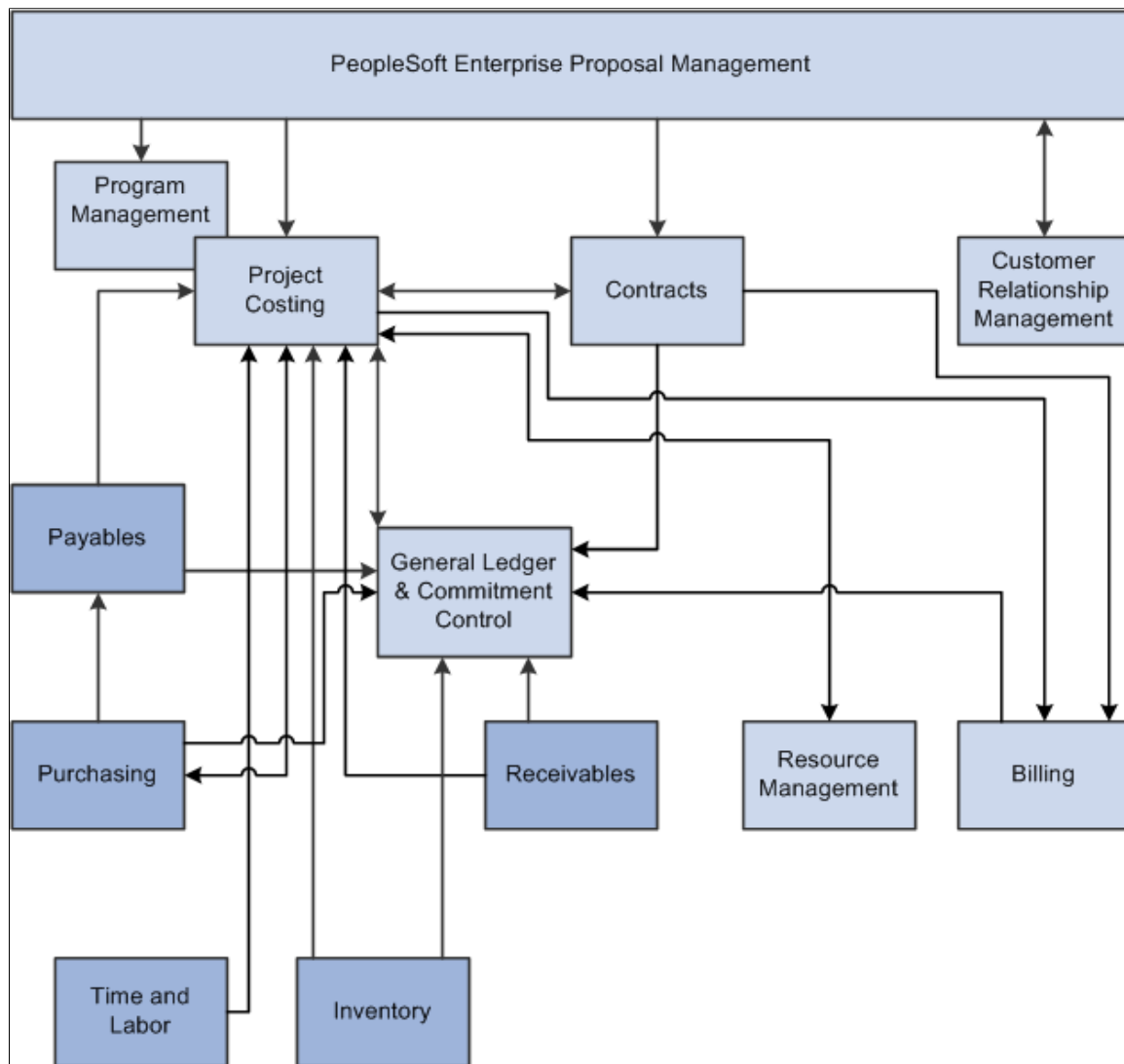
We discuss these business processes in the business process and integration topics.

PeopleSoft Proposal Management Integrations

PeopleSoft Proposal Management integrates with PeopleSoft Program Management, Project Costing, Contracts, CRM, Payables, General Ledger, Purchasing, Receivables, Resource Management, Billing, Time and Labor, and Inventory.

Image: Proposal Management integration flow with other PeopleSoft applications

The integration touch points are depicted in this diagram.



Supplemental information about third-party application integrations is located on the PeopleSoft My Oracle Support website.

PeopleSoft Proposal Management Implementation

PeopleSoft Setup Manager enables you to generate a list of setup tasks for your organization based on the features that you are implementing. The setup tasks include the components that you must set up,

listed in the order in which you must enter data into the component tables, and links to the corresponding documentation.

Because PeopleSoft Proposal Management is a solution that requires the installation of several different applications, you must use Setup Manager separately for each application that you install. PeopleSoft Proposal Management requires that you follow the order listed below when using Setup Manager:

1. PeopleSoft Project Costing
2. PeopleSoft Program Management
3. PeopleSoft Contracts
4. PeopleSoft Proposal Management

PeopleSoft Financials also provides component interfaces to help you load data from your existing system into PeopleSoft tables. Use the Excel to Component Interface utility with the component interfaces to populate the tables:

| Component | Component Interface | Reference |
|--|----------------------------|---|
| Account (GL_ACCOUNT) | ACCOUNT_CF | See "Adding Account Values (<i>PeopleSoft FSCM 9.2: Application Fundamentals</i>)". |
| Alternate Account (ALTACCT) | ALTACCT_CF | See "Understanding Alternate Accounts (<i>PeopleSoft FSCM 9.2: Application Fundamentals</i>)". |
| Bank Branch Information (BANK_BRANCHPNL) | TR_BANK_BRANCH_CI | See "Understanding Bank Setup (<i>PeopleSoft FSCM 9.2: Banks Setup and Processing</i>)". |
| Budget Reference (BUDREF_PNL) | BUDGET_REF | See "Budget Reference Page (<i>PeopleSoft FSCM 9.2: Application Fundamentals</i>)". |
| Chartfield 1 (CHARTFIELD1) | CHARTFIELD1 | See "ChartField 1 Page (<i>PeopleSoft FSCM 9.2: Application Fundamentals</i>)". |
| Chartfield 2 (CHARTFIELD2) | CHARTFIELD2 | See "ChartField 1 Page (<i>PeopleSoft FSCM 9.2: Application Fundamentals</i>)". |
| Chartfield 3 (CHARTFIELD3) | CHARTFIELD3 | See "ChartField 1 Page (<i>PeopleSoft FSCM 9.2: Application Fundamentals</i>)". |
| Class Field (CLASS_PNL) | CLASS_CF | See "Class Field Page (<i>PeopleSoft FSCM 9.2: Application Fundamentals</i>)". |
| Contact Info (CONTACT_INFO) | CONTACT | See "Setting Up and Maintaining Contacts (<i>PeopleSoft FSCM 9.2: Order to Cash Common Information</i>)". |
| Customer Group Table (CUST_GROUP_TBL) | CUSTOMER_GROUP | See "Customer Group Table Page (<i>PeopleSoft FSCM 9.2: Order to Cash Common Information</i>)". |
| Department (DEPARTMENT) | DEPT_CF | See "Department Page (<i>PeopleSoft FSCM 9.2: Application Fundamentals</i>)". |

| Component | Component Interface | Reference |
|--|--|---|
| Fund Code (FUND_DEFINITION) | FUND_CF | See "Fund Code Page (<i>PeopleSoft FSCM 9.2: Application Fundamentals</i>)". |
| General Information (CUSTOMER_GENERAL) | CUSTOMER_MAIN_CI CUSTOMER_BILLTO_CI CUSTOMER_SOLDTO_CI CUSTOMER_SHIPTO_CI CUSTOMER_MISC_CI | See "Adding General Customer Information (<i>PeopleSoft FSCM 9.2: Order to Cash Common Information</i>)". |
| InterUnit Pair Maintenance (IU_INTER_PR_BASIC) | IU_INTER_PR_BASIC | See "Interunit Pairs (<i>PeopleSoft FSCM 9.2: Application Fundamentals</i>)". |
| InterUnit Template (IU_INTER_TMPLT) | IU_INTER_TMPLT | See "InterUnit Template Page (<i>PeopleSoft FSCM 9.2: Application Fundamentals</i>)". |
| IntraUnit Template (IU_INTRA_TMPLT) | IU_INTRA_TMPLT | See "InterUnit Template Page (<i>PeopleSoft FSCM 9.2: Application Fundamentals</i>)". |
| Ledgers for a Unit (BUSINESS_UNIT_LED) | EM_BUS_UNIT_LED | See "Defining Ledgers for a Business Unit (<i>PeopleSoft FSCM 9.2: Application Fundamentals</i>)". |
| Operating Unit (OPERATING_UNIT) | OPER_UNIT_CF | See "Operating Unit Page (<i>PeopleSoft FSCM 9.2: Application Fundamentals</i>)". |
| Product (PRODUCT) | PRODUCT_CF | See "Product Page (<i>PeopleSoft FSCM 9.2: Application Fundamentals</i>)". |
| Program Code (PROGRAM_DEFINITION) | PROGRAM_CF | See "Program Code Page (<i>PeopleSoft FSCM 9.2: Application Fundamentals</i>)". |
| Project ID (PROJECT) | PROJECT_CF | See "Project Page (<i>PeopleSoft FSCM 9.2: Application Fundamentals</i>)". |
| Scenario (BD_SCENARIO) | BUDGET_SCENARIO | See "Scenario Page (<i>PeopleSoft FSCM 9.2: Application Fundamentals</i>)". |
| Statistics Code (STATISTICS_TBL) | STATISTICS_CODE | See "Statistics Code Page (<i>PeopleSoft FSCM 9.2: Application Fundamentals</i>)". |
| Support Team Members (TEAM_MEMBER_TABLE) | TEAM_MEMBER_TABLE_CI | See "Setting Up Customer Support Personnel (<i>PeopleSoft FSCM 9.2: Order to Cash Common Information</i>)". |
| Team Member Personal Data (MEMBER_PERSON1) | MEMBER_PERSON1_CI | See "Setting Up Customer Support Personnel (<i>PeopleSoft FSCM 9.2: Order to Cash Common Information</i>)". |

| Component | Component Interface | Reference |
|---|----------------------------|---|
| Team Member Types (MEMBER_TYPE_TABLE) | MEMBER_TYPE_TABLE_CI | See "Setting Up Customer Support Personnel (<i>PeopleSoft FSCM 9.2: Order to Cash Common Information</i>)". |
| Value Added Tax Code (TAX_CODE_VAT) | TAX_CODE_VAT | See "Value Added Tax Code Page (<i>PeopleSoft FSCM 9.2: Global Options and Reports</i>)". |
| VAT Accounts by Business Unit (TAX_BU_CODE_VAT) | TAX_BU_CODE_VAT | See "VAT Accounts by Business Unit Page (<i>PeopleSoft FSCM 9.2: Global Options and Reports</i>)". |
| Vat Defaults CI Component (VAT_DEF_CI) | VAT_DEF_CI | See "Establishing VAT Defaults (<i>PeopleSoft FSCM 9.2: Global Options and Reports</i>)". |
| VAT Entity (VAT_ENTITY_ID) | VAT_ENTITY_ID | See "Setting Up VAT Entities (<i>PeopleSoft FSCM 9.2: Global Options and Reports</i>)". |
| User Preferences (OPR_DEFAULT) | OPR_DEFAULT_FIN | See "Defining Cross-Application User Preferences (<i>PeopleSoft FSCM 9.2: Application Fundamentals</i>)". |

Other Sources of Information

In the implementation planning phase, take advantage of all the PeopleSoft sources of information, including the installation guides, data models, business process maps, and troubleshooting guidelines.

See the product documentation for *PeopleTools: PeopleSoft Setup Manager* and *PeopleTools: PeopleSoft Component Interfaces*.

Chapter 2

Navigating in PeopleSoft Proposal Management

Navigating in PeopleSoft Proposal Management

PeopleSoft Proposal Management provides custom navigation center pages that contain groupings of folders that support a specific business process, task, or user role.

Note: In addition to the PeopleSoft Proposal Management custom navigation center pages, we provide menu navigation, standard navigation pages, and PeopleSoft Navigator.

Note: The icons and features that appear on your PeopleSoft Proposal Management Home page may vary based on user security access and roles.

Pages Used to Navigate in PeopleSoft Proposal Management

This table lists the Custom Navigation Center pages that are used to navigate in PeopleSoft Proposal Management.

| <i>Page Name</i> | <i>Navigation</i> | <i>Usage</i> |
|----------------------------------|---|--|
| Proposal Management Center | Proposal Management, Proposal Management Center | Access the key areas of PeopleSoft Financials to manage your proposals. |
| My Proposal | Click the My Proposal link on the Proposal Management Center page. | Manage proposals from a personal list. |
| Proposal Management | Click the Proposal Management link on the Proposal Management Center page. | Create proposals, versions, and budgets. Also inquire on existing proposals. |
| Resource Estimate | Click the Maintain Version Estimate link on the Proposal Management Center page. | Establish and update version project and activity estimates. |
| Maintain Version Estimate Detail | Click the Maintain Version Est. Detail link on the Proposal Management Center page. | Establish and update version activity estimate details. |
| Copy Proposal | Click the Copy Proposal link on the Proposal Management Center page. | Copy a new proposal from an existing proposal. |
| Contracts | Click the Contracts link on the Proposal Management Center page. | Enter and manage contracts, including billing and revenue recognition options. |

| Page Name | Navigation | Usage |
|------------------|--|--|
| Projects | Click the Projects link on the Proposal Management Center page. | Capture and account for costs and revenue associated with a project. |
| Reports | Click the Reports link on the Proposal Management Center page. | View and create reports. |
| Definitions | Click the Definitions link on the Proposal Management Center page. | Define or maintain PeopleSoft Proposal Management business units and activity types. |

See the product documentation for *PeopleTools: Portal Technology*

Defining Your Operational Structure

Understanding Installation Options

When you install your PeopleSoft system, you need to set up the defaults at the overall system level and at the application-specific level.

This section discusses:

- Overall installation options.
- Application-specific installation options.
- Project delete utility.

Overall Installation Options

Use the pages in the Installation Options component (INSTALLATION) to configure the installation information and to indicate how you want to use certain cross-application features. Use this component to:

- Determine the alternate characters that the system uses for a specific language code.
- Set specific document management control options that enable the embedded document management system and specify system-level configurations.
- Enable the use of entry events in PeopleSoft General Ledger, PeopleSoft Payables, PeopleSoft Purchasing, and PeopleSoft Receivables.

You can find instructions for defining overall installation options in the *PeopleSoft Applications Fundamentals*.

Related Links

"Setting Up Cross-Application Installation Options (*PeopleSoft FSCM 9.2: Application Fundamentals*)"

Application-Specific Installation Options

PeopleSoft Project Costing is the vehicle by which you process most transactions through the system, hence you need a way to identify these transactions as they come in from the various feeder systems. Use the Installation Options - Project Costing Integration page to identify the analysis types that are assigned to the transactions coming into PeopleSoft Project Costing from the different feeder applications.

The system uses analysis types in downstream processing, from pricing out transactions in PeopleSoft Project Costing to billing and revenue recognition. Therefore, you should not modify the delivered analysis types. If you choose to modify them, remember the effects that the change may have on downstream processing.

Use the Installation Options - Contracts page to define installation options that are specific to PeopleSoft Contracts. The values that you select on this page cannot be overridden on the transaction pages in PeopleSoft Contracts. This does not apply to ad hoc products.

In addition, you can use the Installation Options - Billing - General Options page and the Installation Options - Billing - Integration Options page to define installation options specific to PeopleSoft Billing.

You can find instructions for setting application-specific installation options in the *PeopleSoft Applications Fundamentals*.

Related Links

"Setting Up Application-Specific Installation Options (*PeopleSoft FSCM 9.2: Application Fundamentals*)"

Project Delete Utility

In PeopleSoft Proposal Management, when a user selects another version of a proposal that has established project and team structures in place, the system calls the Project Delete Utility from the PeopleCode and deletes the PeopleSoft Project Costing structures under that proposal version. To activate the Project Delete Utility for a particular business unit, you need to set up the project delete options on the Delete Utilities Tables page in PeopleSoft Project Costing.

Setting up this page is a requirement in PeopleSoft Project Costing. To copy the existing settings of another business unit, access the Delete Utilities Tables page, select an existing PeopleSoft Project Costing business unit, and then click the Copy Settings button.

Setting up the Delete Utilities Tables page establishes the parameters for how the system deletes projects, activities, and resources within a specified business unit when the system runs the Project Delete Utility.

You can find instructions for setting up the Project Delete Utility in the *PeopleSoft Project Costing*.

Related Links

"Delete Utility Tables Page (*PeopleSoft FSCM 9.2: Project Costing*)"

Understanding Integration Templates

PeopleSoft Proposal Management integrates with PeopleSoft Project Costing, PeopleSoft Program Management, PeopleSoft Contracts, PeopleSoft General Ledger, PeopleSoft Billing, PeopleSoft Receivables, PeopleSoft Payables, and PeopleSoft Purchasing to deliver a full-featured solution. When implementing PeopleSoft Financials applications, the order in which you perform the setup is important. In most cases, you set up the PeopleSoft General Ledger system first because of the default values, calendars, and ledger groups that the other financial applications use downstream.

Before you can make the most effective use of PeopleSoft Proposal Management, you need to establish the basic information that the system uses in its processing. Most of the implementation procedures are one-time sequences of data entry that provide the system with core information about the organization.

The system uses integration templates to identify the PeopleSoft General Ledger business unit with which your projects are associated. Because transactions that are related to PeopleSoft Proposal Management are processed through PeopleSoft Project Costing, you need to establish this relationship in the system.

Before you can begin to track contracts and the costs that are associated with them, you must define the integration template that the PeopleSoft Project Costing business unit will use. This template tells the system which primary PeopleSoft General Ledger business unit will interact with the PeopleSoft Project Costing business unit.

Note: PeopleSoft Proposal Management uses the PeopleSoft General Ledger business unit that is designated as the Primary Ledger Business Unit on the General Ledger Integration page. Select Setup Financials/Supply Chain, Product Related, Project Costing, Project Options, Integration Templates, General Ledger Integration.

You can find instructions for defining integration templates in the *PeopleSoft Project Costing*.

Related Links

"General Integration Page (*PeopleSoft FSCM 9.2: Project Costing*)"

Understanding Business Unit Default Setup

You must establish business units using the business unit setup pages for PeopleSoft Project Costing and PeopleSoft Contracts before you can set up business unit defaults and confidence levels in PeopleSoft Proposal Management. There are no fields on the PeopleSoft Contracts business unit pages that you set up specifically for PeopleSoft Proposal Management; PeopleSoft Proposal Management uses the contract business units as they are defined for PeopleSoft Contracts. You should set up business units and business unit default values in this order:

1. PeopleSoft Project Costing business units.
2. Contract business units.
3. PeopleSoft Proposal Management default values for confidence levels and contract business units.

PeopleSoft Project Costing Business Units

In PeopleSoft Project Costing, you must have at least a project business unit and integration template set up to use PeopleSoft Proposal Management. PeopleSoft Proposal Management uses the tables in PeopleSoft Project Costing to store information, so you must establish the business units that you plan to use in PeopleSoft Project Costing on both the Project Costing Definition and Project Costing Options pages.

After you set up the PeopleSoft Project Costing business units in PeopleSoft Project Costing, use the Projects BU page in PeopleSoft Proposal Management to select the integration template and the expense and revenue ledgers that you want to use for accounting.

Related Links

[Defining PeopleSoft Proposal Management Defaults and Confidence Levels for Business Units](#)

PeopleSoft Contracts Business Units

You must have PeopleSoft Contracts in place before you can use PeopleSoft Proposal Management. The business unit that you select in PeopleSoft Proposal Management when you create a proposal

comes from the Contracts Business Unit table. You establish business units that you plan to use in PeopleSoft Contracts on both the BU Definition page and the BU Options page. After you set up the contracts business units in PeopleSoft Contracts, use the Contracts BU Setup page in PeopleSoft Proposal Management to establish defaults for proposal-level fields and for the Generate process.

Related Links

"PeopleSoft Contracts Business Processes (*PeopleSoft FSCM 9.2: Contracts*)"

Understanding Products

In PeopleSoft Contracts, a contract must have contract lines to be billed. When you initiate the Generate process from PeopleSoft Proposal Management, the system sends data from the proposal to the appropriate pages in PeopleSoft Contracts.

Contract lines are required because they control the processing for the billing and revenue recognition activities. Every contract must have at least one contract line associated with it. The contract line is connected to the contract during the Generate process. In PeopleSoft Contracts, each contract line has a product ID defined. A product ID is a good or service that you provide to a customer.

In PeopleSoft Contracts, there is a distinction between the products that you define:

- Fixed Amount Products.

These are goods that are associated with a fixed monetary amount (for example, software, maintenance contracts, building structures, and so on). You create these products on the Product Definition pages and process transactions through PeopleSoft Contracts. When you set up fixed amount products for PeopleSoft Proposal Management, select *Amount* as the price type on the Product Definition - Contracts Options page, and then select a revenue method. The system ignores the other fields on the page during the Generate process.

- Rate Based Products.

These are services that are associated with a rate (for example, consulting services, time and labor expenses, and so on). PeopleSoft Project Costing controls these products, but PeopleSoft Contracts manages the processing. When you set up rate-based products for PeopleSoft Proposal Management, select *Rate* as the price type on the Product Definition - Contracts Options page, and then select a revenue method. The system ignores the other fields on the page during the Contract Generation process.

To bill your customers, you need to define products that represent the contract lines on your contracts. You must define at least one product, but you may define as many products as you require.

Note: For PeopleSoft Proposal Management, the Product Use field on the Product - Definition page must be set to either *Contracts Only* or *General Use*. On the Proposal Management Contracts BU Setup page, you cannot select products with product uses that are defined as *General Use Excluding Contracts*. For PeopleSoft Proposal Management, the product IDs defined on the Proposal Management Contracts BU Setup page are defaults for the activity level. They are required on the BU Setup page, but you may override them at the activity level because contract lines bill at the activity level.

You can find instructions for defining products in the *PeopleSoft Contracts* documentation.

Related Links

"Setting Up Products and Product Groups (*PeopleSoft FSCM 9.2: Contracts*)"

Defining PeopleSoft Proposal Management Defaults and Confidence Levels for Business Units

Use these components to set up defaults for PeopleSoft Project Costing and PeopleSoft Contracts business units:

- Proposal Management BU Def (GM_BU_PM_SETUP)
- PM PC BU Setup (GM_PM_BU_PC)

This section provides an overview of PeopleSoft Proposal Management defaults and confidence levels and discusses how to:

- Define PeopleSoft Proposal Management defaults for the PeopleSoft Project Costing business unit.
- Define PeopleSoft Proposal Management defaults for the PeopleSoft Contracts business unit.
- Define confidence levels for PeopleSoft Proposal Management.

Note: There is a dependency in the setup procedures described in this section in that you must establish business units using the business unit setup pages for both PeopleSoft Project Costing and PeopleSoft Contracts before you can set up defaults and confidence levels for the business units in PeopleSoft Proposal Management.

Pages Used to Define PeopleSoft Proposal Management Defaults and Confidence Levels for the Business Units

| Page Name | Definition Name | Navigation | Usage |
|------------------------|------------------|---|---|
| Projects BU | GM_PM_BU_PC | Setup Financials/Supply Chain, Business Unit Related, Proposal Management, Projects BU | Define proposal management defaults for the PeopleSoft Project Costing business unit. |
| Contracts BU Setup | GM_BU_PM_SETUP | Setup Financials/Supply Chain, Business Unit Related, Proposal Management, Contracts BU, Contracts BU Setup | Define proposal management defaults for the Contracts business unit. |
| Confidence Level Setup | GM_BU_CONF_SETUP | Setup Financials/Supply Chain, Business Unit Related, Proposal Management, Contracts BU, Confidence Level Setup | Define confidence levels for the proposals. |

Understanding PeopleSoft Proposal Management Defaults and Confidence Levels

Because the system captures transactional data in PeopleSoft Project Costing, you must define the PeopleSoft Project Costing business units in both PeopleSoft Project Costing and PeopleSoft Proposal Management. The PeopleSoft Project Costing business unit setup pages provide default values in PeopleSoft Project Costing when a user runs the Generate process from PeopleSoft Proposal Management. It also tells the system what default ledger groups and ledgers to use to book revenue and expense information to PeopleSoft General Ledger.

To perform the day-to-day functions of contracts management, you must also define the contracts business unit in both PeopleSoft Contracts and PeopleSoft Proposal Management. The system uses the default values that you established on the PeopleSoft Contracts business unit setup pages during the Generate process in PeopleSoft Proposal Management to populate fields on the Contract pages in PeopleSoft Contracts. The information that you define on the contracts business unit setup pages described in this section appears by default on the Contract-General and Contract-Lines pages.

To give users a visual clue about the likelihood that a proposal will be sold, you can set up and maintain confidence levels. You can enter percentages for three confidence levels: high, medium, and low. The system translates the confidence levels into symbols that appear to the right of the Confidence Pct (confidence percentage) field on the Maintain Proposal page when a user enters a value and saves the proposal. The symbol also appears on the My Proposals page. In addition, you can use confidence levels in your reporting and in the Proposal Operational Summary, Proposal Revenue Pipeline, and Proposal Resource Demand pagelets.

Projects BU Page

Use the Projects BU page (GM_PM_BU_PC) to define proposal management defaults for the PeopleSoft Project Costing business unit.

Navigation

Setup Financials/Supply Chain, Business Unit Related, Proposal Management, Projects BU

Image: Projects BU page

This example illustrates the fields and controls on the Projects BU page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Projects BU' page with the following fields and controls:

- Projects Business Unit:** US001 US001 NEW YORK OPERATIONS
- *Integration:** US001 (with a magnifying glass icon)
- General Ledger BU:** US001
- Ledger Group:** RECORDING (with a magnifying glass icon)
- Ledger:** LOCAL (with a magnifying glass icon)
- *Bill & Cost Rate Plan:** PM_BIL_CST (with a magnifying glass icon)
- *Bill Rate Plan:** PM_BIL_ONLY (with a magnifying glass icon)
- *Cost Rate Plan:** PM_CST_ONLY (with a magnifying glass icon)
- Weeks Unit of Measure:** MWK (with a magnifying glass icon)
- Other Unit of Measure:** EA (with a magnifying glass icon)
- Calendar:** MN (with a magnifying glass icon)

* Required Fields

Note: After you select an integration template, the system displays the appropriate ledger and ledger group fields based on how you have configured your PeopleSoft General Ledger system. If you are using PeopleSoft Commitment Control, the system displays separate ledger and ledger group fields for expense and revenue transactions.

Ledger Group and Ledger are for non-Commitment Control General Ledger business units. Revenue Ledger Group, Revenue Ledger, Expense Ledger Group, and Expense Ledger are for Commitment Control General Ledger business units. In all situations, ledger fields are optional, but ledger groups fields are required.

Integration

Select the template that defines the integration between PeopleSoft Project Costing and the other PeopleSoft Financials applications. Each integration template that you create defines a specific set of business units from the other financial applications.

Ledger Group and Ledger

Select the ledger group and ledger that you want the system to use when posting transactions to the general ledger from the business unit.

Expense Ledger Group, Expense Ledger, Revenue Ledger Group, and Revenue Ledger

These fields appear only if you are set up to use PeopleSoft Commitment Control. Select the ledger groups and ledgers that you want the system to default when bringing forward expense and revenue rows that are to be posted to the general ledger.

Bill & Cost Rate Plan

Select a rate plan with billing and costing rate sets. The prompt view for this field displays only active rate plans that contain both billing and costing rate sets.

Bill Rate Plan

Select a rate plan with billing rate sets only. The prompt view for this field displays only active rate plans that contain billing rate sets only.

Cost Rate Plan

Select a rate plan with costing rate sets only. The prompt view for this field displays only active rate plans that contain costing rate sets.

Weeks Unit of Measure

Select *MWK* for the default unit of measure to use when employees select Labor Configuration of *Weeks* on proposals.

PeopleSoft Proposal Management enables you to set the Labor Configuration by hour, day, or week; however, PeopleSoft Project Costing only supports hour or day for unit of measure. You can set up the unit of measure for hour or day on the Project Costing Definition page, but you need to set the unit of measure for week on PeopleSoft Proposal Management's Projects BU page.

Other Unit of Measure

Select a unit of measure to default on proposals for non-labor items.

Calendar

This field provides an override value to the default budget calendar that is used by Projects budgets. A budget calendar can be defined for one budget period with a vast time span to cover the start and end date periods for projects.

Related Links

"General Integration Page (*PeopleSoft FSCM 9.2: Project Costing*)"

"Understanding Ledgers (*PeopleSoft FSCM 9.2: Application Fundamentals*)"

Contracts BU Setup Page

Use the Contracts BU Setup page (GM_BU_PM_SETUP) to define proposal management defaults for the Contracts business unit.

Navigation

Setup Financials/Supply Chain, Business Unit Related, Proposal Management, Contracts BU, Contracts BU Setup

Image: Contracts BU Setup page

This example illustrates the fields and controls on the Contracts BU Setup page. You can find definitions for the fields and controls later on this page.

Contracts BU Setup | Confidence Level Setup

Business Unit US001 US001 NEW YORK OPERATIONS

PC Business Unit US001

*Billing BU US001

*Contract Type CONSULTING

*Contract Legal Entity KBSCONSULT

*Contract Status PENDING

*Rate Based Product PPSL_MGMT_RATE

*Fixed Amount Product PPSL_MGMT_AMT

*Bill Type Identifier CA

Minimum Bill Amount

Security

☒ Yes

☐ No

* Required Fields

PC Business Unit (project costing business unit)

Select the PeopleSoft Project Costing business unit in which you want to store your projects-related information.

Billing BU (billing business unit)

Select the business unit that you want to use for billing. This field is a default for contracts that are created under this business unit. The values that you can select are limited to those PeopleSoft Billing business units that are linked to the same general ledger business unit as the contracts business unit.

Contract Type

Select a value to categorize your contracts for reporting purposes.

Bill Type Identifier

Select a bill type. This field is a default for contracts that are created under the business unit. The bill type represents a category of activity that is being billed.

Contract Legal Entity

Select a legal entity from the list of entities that you established on the Define Legal Entity page in PeopleSoft Contracts. This is the legal entity in your company that owns or has signed the contract. A legal entity is required for contract activation.

Minimum Bill Amount

Enter an amount to specify the minimum threshold that will produce a bill during contract administration.

Contract Status

Select the status to appear by default when the contract is first established. The system uses this field to control all processing that occurs against a contract.

Rate Based Product

Select the rate-based product that you will use most often on the contract lines. The lookup list for this field displays only product IDs with a price type of *Rate* and a revenue recognition method of *As Incurred*. Products are defined on the Product Definition pages and in PeopleSoft Contracts.

Fixed Amount Product

Select the fixed-amount product offering that you will use most often on the contract lines.

The lookup list for this field displays only products with a price type of *Amount* and a revenue recognition method other than *As Incurred*. Products are defined in the Product Definition pages and in PeopleSoft Contracts.

Security

Select *Yes* to enable security. When security is enabled, the list of users who can view a proposal is limited to those who have been given security access on the Proposal - Set Up Options page.

Related Links

"Defining Contract Types (*PeopleSoft FSCM 9.2: Contracts*)"

"Defining Legal Entities (*PeopleSoft FSCM 9.2: Contracts*)"

"Defining Contract Statuses (*PeopleSoft FSCM 9.2: Contracts*)"

"Understanding PeopleSoft Billing Business Units (*PeopleSoft FSCM 9.2: Billing*)"

Confidence Level Setup Page


Use the Confidence Level Setup page (GM_BU_CONF_SETUP) to define confidence levels for the proposals.

Navigation

Setup Financials/Supply Chain, Business Unit Related, Proposal Management, Contracts BU, Confidence Level Setup

Image: Confidence Level Setup page

This example illustrates the fields and controls on the Confidence Level Setup page. You can find definitions for the fields and controls later on this page.

| <u>C</u> ontracts BU Setup | Confidence Level Setup |
|----------------------------|--|
| Business Unit US001 | |
| Low Confidence | |
| Percent From 0 | Percent To 70  |
| Medium Confidence | |
| Percent From 71 | Percent To 85  |
| High Confidence | |
| Percent From 86 | Percent To 100  |

Percent To

Enter the highest percent value to which you want to set the confidence level for the low and medium categories. The symbol to the right of the field appears on the Maintain Proposal page when a user enters a value in the Confidence Pct field and saves the proposal. It also appears on the My Proposals page and the Proposal Operational Summary pagelet.

Chapter 4

Securing Your PeopleSoft Proposal Management System

Understanding PeopleSoft Proposal Management Security

This section discusses:

- Multilevel security.
- Security by department and user ID.

Multilevel Security

PeopleSoft Proposal Management uses multilevel security. Use the security setup pages in PeopleTools to provide access to the data, functions, and pages that give users the ability to perform their work. To define security for the organization, you must:

- Define permission lists.
- Set up user roles.
- Assign permission lists to roles.

PeopleSoft Proposal Management supports user security, which enables you to limit access to specific PeopleSoft Proposal Management proposals based on the user and department. Therefore, it is possible for a user to have access to a subset of all the proposals that may be stored in the system. This security feature augments the normal PeopleSoft security based on the user class, which defines the menus and components available to a given user ID.

By default, if you have not set up department-level security, users only have access to their own proposals. That is, they can only access a proposal if these conditions are met:

- Their user ID has an employee ID associated with it.
- They have used their employee ID to initiate the proposal.

You can associate each user ID to an employee ID (EMPLID) when you create it.

Security by Department and User ID

Implementing security within PeopleSoft Proposal Management is optional. If you want to restrict the list of users who can view proposals, select *Yes* in the Security group box on the Contracts BU Setup page. If you want all proposals under a business unit to be visible to all users, select *No*. When you enable security, the list of users who can view proposals is limited to those who have been granted security access on the Proposal - Set Up Options page.

Establish PeopleSoft Proposal Management security by setting up a series of associations that limit or provide user access to components. Set up these associations by linking user IDs with a security tree node that represents a department or group of departments. When a user attempts to open a component, the system examines the associations between that user's ID and user class. If you have established appropriate links, the user can open the pages. Additionally, the search records for each component only enable the user to access the records that have departments that are associated with the security tree.

Note: The pages listed in this procedure are fully documented in PeopleTools documentation.

To set up security by Department ID:

1. Create a new role by selecting PeopleTools, Security, Permissions & Roles, Roles.

You can create as many roles as necessary. You will want to create a role for every set of users that needs a different level of security access to the data.

2. Create user IDs and assign roles to user IDs by selecting PeopleTools, Security, User Profiles, User Profiles.

Note: Be sure to assign a valid employee ID. This ID will be matched with the proposal or proposal project to determine which proposals can be accessed by this user ID when no department-level access is specified.

3. Define the PeopleSoft Proposal Management security tree by selecting Tree Manager, Tree Manager.

Set up the security tree based on an analysis of business processes within the organization. If a department tree already exists and mirrors a department hierarchy that would provide the appropriate coverage for security needs, we recommend that you copy that tree.

Note: The department security tree *must* be a node-oriented tree. That is, each node on the tree must represent a valid department that exists in the Department table (DEPARTMENT_TBL). When you define the detail tree structure, make sure that the node record equals the Department table and the field equals Department ID (DEPTID).

4. Assign an object group to a permission list by selecting PeopleTools, Security, Permissions & Roles, Permission Lists.
5. Define operator security by selecting Set Up Financials/Supply Chain, Security, Proposal Management Security.

Select the tree SetID, tree name, and the effective date of tree. In the lower section of the page, select the department designation and access code. You can enter as many departments as you need.

6. Change the search records for PeopleSoft Proposal Management components by selecting PeopleTools, Application Designer, File, Open, Components.

The search record that we deliver for these proposal components provides department-level security. Currently, the search records that are defined below are delivered with the system. You may replace these security search records if you require a different security scheme.

This table lists the menu navigations, components, and search records used in PeopleSoft Proposal Management:

| <i>Menu Navigation</i> | <i>Component</i> | <i>Search Record</i> |
|---|-------------------------|-----------------------------|
| Proposal Management, Proposal and Version, Maintain Proposal | GM_OPPTY_HDR | GM_OPTY_SRCH_VW |
| Proposal Management, Proposal and Version, Maintain Version Estimate | GM_OPPTY_PRJCT | GM_OPVR_SRCH_VW |
| Proposal Management, Proposal and Version, Maintain Version Est. Detail | GM_PM_RSRC_DTL | GM_PM_ACTV_RSRC |
| Proposal Management, Proposal and Version, Copy Proposal | GM_BUD_PPSL_CPY | GM_PROP_SRCH |

Chapter 5

Structuring PeopleSoft Proposal Management

Understanding PeopleSoft Proposal Management Structure

This section discusses:

- Customer information.
- Proposal contacts.
- Project roles and rates.
- Proposal planners.

Customer Information

To add customers to the database, enter the required information in the General Information component (CUSTOMER_GENERAL). To enter new customer information using the least number of fields, access the pages in the Quick Customer Create component. You can also use Quick Customer Create to determine whether a customer exists in the system.

To initiate a number-sequencing scheme, access the Auto Numbering page and set the automatic numbering options.

Related Links

"Defining Additional Common Information (*PeopleSoft FSCM 9.2: Application Fundamentals*)"

"Using Quick Customer Create Functionality (*PeopleSoft FSCM 9.2: Order to Cash Common Information*)"

"Auto Numbering page (*PeopleSoft FSCM 9.2: Application Fundamentals*)"

Proposal Contacts

Proposal contacts are members of support teams. Support team members are the personnel in your organization who are involved in customer support and managing support teams.

To add proposal contacts to PeopleSoft Proposal Management, you must set up each team member as a sales person in the Team Member Personal Data component (MEMBER_PERSON1). You can then assemble members into teams and associate teams with customers, quotes, and sales orders.

Related Links

"Using Quick Customer Create Functionality (*PeopleSoft FSCM 9.2: Order to Cash Common Information*)"

Project Roles and Rates

In PeopleSoft Project Costing, you can define and assign rates by role. Additionally, you can establish distinct rates by region. Role rates include the setup of both the rate that you bill the client and the costs for providing the person who is assigned to the role. You can use these rates on the Maintain Version Estimate Detail page in PeopleSoft Proposal Management to price and cost proposals.

You can change the role rates for specific activities on projects in a proposal. By changing a role rate on the Maintain Version Estimate Detail page, you change the role rate for all occurrences of that role on the activity. The same role can have different custom rates for different activities on a project in the same proposal.

Before you can create and use role rates, you must first define security profiles and project roles in PeopleSoft Project Costing.

Proposal Planners

Typically, you bring human resource information into PeopleSoft Financials from a human resources system. You do not usually have to add new employees or assign them employee IDs. However, you can add new employee records on the Personal Data (Edit) page (EX_PERSONAL_DATA2) using the Setup Financials/Supply Chain, Common Definitions, Employee Data, Create/Update Personal Data navigation.

Warning! Any data that you enter or modify on the Personal Data (Edit) page is not reflected in the human resources system and is subject to override.

Related Links

"Defining Additional Common Information (*PeopleSoft FSCM 9.2: Application Fundamentals*)"

Defining PeopleSoft Proposal Management Control Data

Use these components to define proposal management control data:

- Activity Type (GM_ACT_TYPE_PM)
- Budget Items (GM_PM_BUD_ITEMS)
- Proposal Key Words (GM_PROP_CTR_KEYWOD)

This section discusses how to:

- Create activity ID templates.
- Create budget items.
- Create key words.

Pages Used to Define PeopleSoft Proposal Management Control Data

| Page Name | Definition Name | Navigation | Usage |
|--------------------|------------------------|---|--|
| Activities | GM_ACTIVITY_PM | Set Up Financials/Supply Chain, Product Related, Proposal Management, Activities | Create activity ID templates. Entering values on this page provides the prompts for the Activity field on the Proposal Time Estimate page. |
| Budget Items | PC_BUD_ITEMS | Set Up Financials/Supply Chain, Product Related, Project Costing, General Options, Budget Items | Create budget items. Entering values on this page provides the prompts for the Budget Item field on the Maintain Version Estimate Detail page. |
| Proposal Key Words | GM_PROP_CTR_KEY | Set Up Financials/Supply Chain, Product Related, Proposal Management, Proposal Key Words | Create key words. Entering values on this page provides the prompts for the Key Word field on the KeyWords page. |

Activities Page

Use the Activities page (GM_ACTIVITY_PM) to create activity ID templates.

Entering values on this page provides the prompts for the Activity field on the Proposal Time Estimate page.

Navigation

Set Up Financials/Supply Chain, Product Related, Proposal Management, Activities

Image: Activities page

This example illustrates the fields and controls on the Activities page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Activities' page in PeopleSoft. At the top, there are tabs for 'SetID' and 'SHARE'. Below that, there are tabs for 'Activity ID' and 'CONSULTATION'. The main section is titled 'Detail' and contains the following fields and controls:

- *Effective Date: 01/01/1900 (with a calendar icon)
- *Status: Active (with a dropdown arrow)
- Short Description: Consult
- *Description: Consultation

There are also buttons for '+', '-', and a 'Detail' button.

Activities are tasks associated with a project. Activity ID templates are labels that identify and group activities to facilitate analysis and reporting about similar activities across all projects. The activities that you enter on this page are available for selection on the Resource Estimate page in PeopleSoft Proposal Management. To add activities to the system, select an effective date and status, and then enter descriptions for each activity.

Budget Items Page

Use the Budget Items page (PC_BUD_ITEMS) to create budget items.

Entering values on this page provides the prompts for the Budget Item field on the Maintain Version Estimate Detail page.

Navigation

Set Up Financials/Supply Chain, Product Related, Project Costing, General Options, Budget Items

Image: Budget Items page

This example illustrates the fields and controls on the Budget Items page. You can find definitions for the fields and controls later on this page.

Budget items provide a way of identifying and grouping transactions; you use them to review an activity's budget costs or revenue for a given period. The system makes the budget items that you enter here available in the Budget Item field on the Maintain Version Estimate Detail page in PeopleSoft Proposal Management.

Budget Items - General Tab

Resource Class

Select a resource class to associate with the budget item.
Options are:

- *Labor*: A human resource, with or without an employee ID, that can be associated with activities.
- *Material*: A consumable resource. For example, computers and office supplies are material resources.
- *Asset*: A non-human resource. For example, equipment and facilities are asset resources.
- *Other*: A resource class to capture subcontractor expenses and expense type expenses such as travel, lodging, and meals.

Description

Enter a description for each budget item that you are creating.

Unit of Measure

Select, if applicable, unit of measure, such as *MHR* (hours), *MDY* (days), *MWK* (week), and *EA* (each), to enforce continuity across a budget.

Billing Business Unit

Enter a business unit if you want to segregate budget amounts by billing business units.

Budget Items - Project Information Tab

Use the fields in this tab to associate fields in PeopleSoft Project Costing with the budget item.

Budget Items - General Ledger Information Tab

Use the fields in this tab to associate ChartFields in PeopleSoft General Ledger with the budget item.

Proposal Key Words Page

Use the Proposal Key Words page (GM_PROP_CTR_KEY) to create key words.

Entering values on this page provides the prompts for the Key Word field on the KeyWords page.

Navigation

Set Up Financials/Supply Chain, Product Related, Proposal Management, Proposal Key Words

Image: Proposal Key Words page

This example illustrates the fields and controls on the Proposal Key Words page.

Use key words to track proposals by subject category and for analysis and reporting. You can associate multiple key words with a proposal. The key words that you enter on this page are available for selection on the Key Words page in PeopleSoft Proposal Management. To add key words to the system, select an effective date and status, and then enter a description for the key word.

Note: You can also add key words from the Resource Estimate page in PeopleSoft Proposal Management.

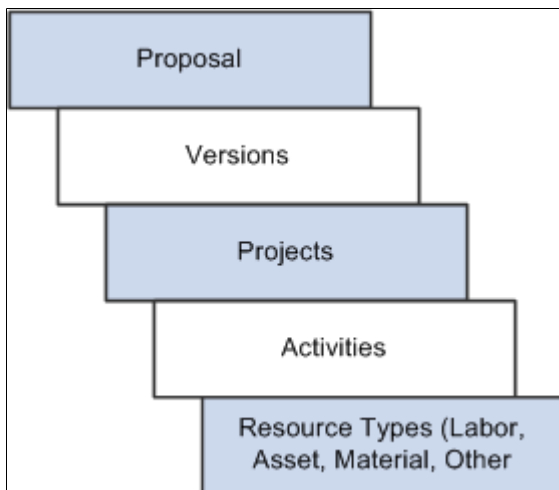
Understanding the Proposal Process

Understanding the Proposal Preparation Process

PeopleSoft Proposal Management enables you to develop and administer project proposals to expedite the closure of business opportunities and to reuse proposal versions for future engagements.

Image: Proposal Hierarchy

This diagram shows the hierarchy of a proposal. Proposals are the highest level of the hierarchy, and can contain multiple versions, which can contain multiple projects that can be associated with multiple activities that are assigned one or more resources.



Using PeopleSoft Proposal Management:

- A proposal can have multiple versions.
- A version can have multiple projects.
- A project can have multiple activities.
- Each project must have at least one activity.
- An Activity can have multiple resources.

To prepare and generate proposal information using PeopleSoft Proposal Management:

- Enter general proposal information.

Proposal preparation begins on the Maintain Proposal page, where you enter or select a start and end date, customer, proposal planner, proposal contact, proposal description, and version description. This information does not usually change throughout the process of creating various proposal versions.

- Configure the system to calculate labor.

You can use the business calendar that you identified at the project level; however, users decide how to estimate their labor at the proposal level. You can estimate labor by hour, start and end dates, or weeks. (The number of hours in a week is driven by the business holiday calendar.)

If you estimate labor by hours, the total will be *Hourly Rate* \times *Hours*.

If you estimate labor by start date and end date, the system uses the business calendar to determine the working hours between the dates.

If you estimate labor by weeks, the total will be *Hours Per Week* \times *Number of Weeks* \times *Hourly Rate*.

On the Time Configuration page, you can configure PeopleSoft Proposal Management to calculate time based on your specific business practices. For example, if you configure PeopleSoft Proposal Management to calculate 10-hour days and you have an hourly rate of 20.00 USD, then the system multiplies the hourly rate by 10 for each estimated day of work. You can also display time information in weeks or use the start and end dates that you entered on the proposal to calculate time estimates.

- Enter security and billing information.

Provided that you have enabled security when you set up your business units, you can limit the number of people who are able to view your proposal by selecting specific departments and employees on the Setup Options page. You can also use this page to tell the system what types of rows to create (bill, cost, both, or none) when you generate contract and budget information from the proposal.

- Enter labor estimates.

You can enter a resource (labor, asset, material, other (subcontract)) estimate for each project and activity that is associated with the proposal. For each project role that is associated with an activity, you can enter the number of people on the project who will be assigned to the role and the estimated number of hours. The system displays the unit cost and bill rates for each resource and then calculates the estimated cost and bill amounts as well as margin percentages for the proposal on the Summary page. On the Cost tab on the Maintain Version Estimate Detail page, you can enter adjustments to the bill rate as a flat amount, a percentage, or a new rate. Time and Expense to Resource are combined.

- Add attachments and key words.

To add information that you can't enter on any of the pages included in the proposal preparation process, you can upload files from your computer or server to the Attachments page that is associated with the proposal. For reporting purposes, you can categorize your proposals by key word by selecting a descriptive word or phrase from the Key Words page.

- Enter adjustments.

After entering all labor and non-labor information for the particular version of the proposal, you can make adjustments to both the overall labor and the overall non-labor totals on the Maintain Proposal page by entering either a positive or negative percentage.

- Enter new proposal versions.

After you finish creating an initial proposal and version, you can create different versions of the same proposal by adding a row in the Version group box on the Maintain Proposal page. As you enter new labor and non-labor information, the system calculates the totals for the particular version of the

proposal and summarizes the information on the Maintain Proposal page. This feature is useful when you want to compare time and expense estimates for different versions of the same proposal. Only one version, however, can be submitted for the Contract Generation process.

- Generate contracts.

After the customer accepts a version of the proposal, you can change the status of the proposal to *Committed* and then generate data that PeopleSoft Contracts, PeopleSoft Project Costing, and PeopleSoft Billing use to create invoices and track project-related information.

Understanding Project Teams

This section discusses:

- Project Teams.
- Project Delete Utility.

Project Teams

PeopleSoft Project Costing uses project teams to identify and manage the resources that are needed to complete an assignment. In PeopleSoft Proposal Management, you can initiate the creation of a project resource team for the selected version of a proposal by selecting the Create Resources Team check box on the Maintain Version Estimate Detail page.

Using the Project Team Summary page in PeopleSoft Project Costing, you can create and modify a project's resource requirements, assign employees directly to a team, and view its current members. You can further define project teams into separate activity teams that can include employees and resource requirements. If you installed Resource Management, then you can also initiate service orders to staff open positions.

If a user selects another proposal version after the project team is created, the system displays a warning message that it will delete any existing project team structures. In this case, the project and the project activity structures are also deleted.

Note: If a user edits the project team structures in PeopleSoft Project Costing after the system creates the project team, the system does not write data back to the Maintain Version Estimate Detail page in PeopleSoft Proposal Management. If you run the Pre-Spending or Contract Generation process, it is not possible to change versions and delete existing projects. This is important as you don't want to orphan projects and activities with transactional activity. You cannot use a project in a pending status for transactional activity, so it is okay to delete these project teams.

Project Delete Utility

To delete unused project team structures, PeopleSoft Project Costing uses an application engine program called the Project Delete Utility. If project and project team structures are set up for the selected version of a proposal, and a user selects another version of the proposal, the system deletes all of the PeopleSoft Project Costing structures under the prior proposal version. The system initiates the deletion of the project structures (including the project team structures) by calling the Project Delete Utility from the PeopleCode.

To make the Project Delete Utility operable, you need to set up the project delete options on the Delete Utility Tables page during the setup of your PeopleSoft Project Costing business units. This is a PeopleSoft Project Costing requirement. The Delete Utility Tables page essentially stores all of the projects tables that you want deleted when you run the Project Delete Utility.

Related Links

"Delete Utility Tables Page (*PeopleSoft FSCM 9.2: Project Costing*)"

Understanding the Generate Process

This section discusses:

- Pre-spending.
- The Generate process.
- Contract general information.
- Contract lines.
- PeopleSoft Billing plans.
- Revenue recognition plans.
- Projects and activities.
- Rate templates.
- Budget generation.

Pre-Spending

Sometimes you need to enable spending before a proposal is formally approved. When you initiate the Pre-Spending process from the Maintain Proposal page, the system creates the selected projects (in a pending status) and the associated activities in PeopleSoft Project Costing. It does not create a contract or bring forward the budget at this time. The process does store the contract ID and project ID with the proposal to reserve them until you are ready to initiate the Generate process.

When you run the Generate process, the system creates the contract, brings forward the budgets, and includes projects and activities that you added since you ran the Pre-Spending process. After you run the Generate process in PeopleSoft Proposal Management for a proposal, you cannot run it again.

The Generate Process

When the proposal status changes to *Committed*, you can run the Generate process to create the contract and project structures. After you run the Generate process, the system automatically updates the Generate status of the proposal to *Generated* on the Maintain Proposal page in PeopleSoft Proposal Management and creates the following based on information from the proposal and on the default values for the contracts business unit:

- Contract general information.

- Contract lines.
- PeopleSoft Billing plans.
- Revenue recognition plans.
- Projects and activities.
- Resource lines (asset, material, labor, and other).
- Rate sets.

After the system creates the contract and the contract lines, you cannot run the Contract Generation process again for the proposal. The system stores the contract and project IDs that you created in PeopleSoft Contracts and PeopleSoft Project Costing with the proposal in the appropriate tables.

Contract General Information

Defining a contract header is the first step in setting up a new contract. The Generate process in PeopleSoft Proposal Management fills in the appropriate fields based on the defaults that you set up for the contracts business unit and on information contained in the proposal.

Contract fields are available for editing until you activate the contract. Then all fields, except for the Contract Status field, become display-only. Any changes to the Contract Entry components must be made through amendment processing.

Before activating a contract, look at the fields on the page to verify that it is the correct contract. Change the contract status to *Active*. A processing status of *Active* indicates that all data for the contract is entered into the system, and that the contract has passed system data validation. A contract must have a status of *Active* for any contract element to be available for processing. Contracts with an *Active* status have these attributes:

- Data fields are available for entry only through amendment processing.
- Downstream processing is enabled for the contract.
- The system has confirmed entry of the required fields and has validated contract data.
- The contract is included in prompt pages.
- Contract amendment control is active for the contract.

Related Links

"Defining General Contract Information (*PeopleSoft FSCM 9.2: Contracts*)"

Contract Lines

A contract line corresponds to an individual product or service. The Generate process in PeopleSoft Proposal Management fills in the appropriate fields based on the defaults that you set up for the contracts business unit and on information contained in the proposal.

A contract line corresponds to an individual product or service. For PeopleSoft Proposal Management contracts, a product is a service that you define on the Product Definition page. The system uses the information from the Contract General page and the product to create a set of default values for the

contract line. You can override much of this default information at the line level and add additional details. For service-related contract lines, you can associate the contract line with additional projects and rates.

Related Links

"Defining Contract Lines (*PeopleSoft FSCM 9.2: Contracts*)"

Billing Plans

Billing plans store information about when billing occurs, how bills should appear, and what notes should relate to the bill. Data from PeopleSoft Contracts drives the creation of bill lines for fixed-price contract lines. For rate-based contract lines, data from both PeopleSoft Contracts and PeopleSoft Project Costing drives the creation of bill lines. In both cases, PeopleSoft Contracts creates the bill lines for the Billing Interface tables (PS_INTFC_BI, PS_INTFC_BI2, PS_INTFC_NOTE, PS_INTFC_BI_AEDS, and PS_INTFC_BI_HDR).

The Generate process in PeopleSoft Proposal Management fills in the appropriate fields on the Billing Plan General page in PeopleSoft Contracts based on the default values that you set up for the PeopleSoft Proposal Management business unit and associated bill and bill detail templates on the products assigned to activities.

When you change the contract status to *Active*, the system automatically changes the status of the billing plan to *Ready*. At this point, you can initiate the Contracts Billing Engine process to select the billing plan for processing. To transfer bill lines to PeopleSoft Billing, you must run the Contracts/Billing Interface process (CA_BI_INTFC).

Note: The system creates billing plans only if a billing plan template is assigned to the product ID used on the contract line.

Related Links

"Understanding Billing in Contracts (*PeopleSoft FSCM 9.2: Contracts*)"

"Understanding the Contracts Billing Process (*PeopleSoft FSCM 9.2: Contracts*)"

"Establishing Product Definitions (*PeopleSoft FSCM 9.2: Order to Cash Common Information*)"

Revenue Recognition Plans

Revenue recognition plans lists events that define when revenue is recognized for each contract line that is linked to that revenue recognition plan. You associate events with either percentages or amounts. The percentage or amount reflects how much of the contract line's negotiated amount is recognized upon a certain date, milestone, or user-initiated action.

The Generate process in PeopleSoft Proposal Management fills in the appropriate fields on the Rev Rec Plan (revenue recognition plan) page in PeopleSoft Contracts based on the defaults that you set up for the PeopleSoft Contracts business unit and on information contained in the proposal. When you change the contract status to *Active*, the system automatically changes the status of the revenue recognition plan to *Ready*.

Data from PeopleSoft Contracts drives the creation of accounting entries for fixed-amount contract lines. For rate-based contract lines, data from PeopleSoft Contracts and PeopleSoft Project Costing drives the

creation of accounting entries. In both cases, PeopleSoft Contracts creates accounting entries to send to PeopleSoft General Ledger and creates the bill lines that the system sends to PeopleSoft Billing.

PeopleSoft Contracts generates the revenue entries, crediting revenue and debiting unbilled accounts receivable (AR), and then sends these entries to PeopleSoft General Ledger. PeopleSoft Billing generates the offsetting entries, crediting unbilled AR and debiting PeopleSoft Receivables.

Note: The system creates revenue recognition plans only if a revenue plan template is assigned to the product ID used on the contract line.

Related Links

"Establishing Product Definitions (*PeopleSoft FSCM 9.2: Order to Cash Common Information*)"

"Understanding Revenue Plans (*PeopleSoft FSCM 9.2: Contracts*)"

Projects and Activities

The Generate process creates projects and activities in PeopleSoft Project Costing based on information that is contained in the proposal. If the system cannot create the required structures, then the Generate process cannot be completed.

To verify that the project and activities exist, navigate to the Related Projects page from the Details tab on the Lines page in PeopleSoft Contracts. You can also navigate to the Project General page through the PeopleSoft Project Costing navigational structure.

After you create projects and activities through the Generate process, you can maintain project information, perform project analysis, track procurement costs, create budgets, track expenses, gather resource costs, price resources, process allocations, and generate operational reports.

Related Links

"Understanding Projects (*PeopleSoft FSCM 9.2: Project Costing*)"

"Understanding Activities (*PeopleSoft FSCM 9.2: Project Costing*)"

Rate Sets

You charge customers a rate for the services that you provide plus the related costs. By establishing rate sets and rate plans in PeopleSoft Project Costing, you can efficiently manage pricing across multiple project activities using a limited number of rate plans. Rate sets and rate plans in PeopleSoft Project Costing are dynamic and subject to change in rate structure over time.

When you sell a service to a customer, you establish rates for that service. The service can be provided at your standard billing rates, which may be subject to change over time, or you might provide services at rates that are fixed for the duration of the contract obligation.

For details about using the rate plan and defining rate sets for rate-based contract lines, refer to the *PeopleSoft Contracts* documentation.

Related Links

"Understanding the Relationship Between PeopleSoft Contracts and PeopleSoft Project Costing (*PeopleSoft FSCM 9.2: Contracts*)"

"Understanding Integration with PeopleSoft Contracts and PeopleSoft Billing (*PeopleSoft FSCM 9.2: Project Costing*)"

Budget Generation

When you run the Generate process, the system creates in PeopleSoft Program Management's ARL the project team and activity resource team information along with bill and cost rates. Resource lines with markup or markdown appear in the ARL as custom rate type lines.

The Generate process then creates revenue and cost budget plans. In doing this, the Generate process calls the Get Plan Application Engine process (PGM_SPREAD) to spread the budget detail based on the defined calendar and any markup or markdown amounts appear as single rows per resource line on the Budget Detail page. For example, if there two bill rows and a 10 percent markup, the system creates one line for each resource row as follows:

| Line Number | Row Type | Results |
|--------------------|------------------------------|----------------|
| Line 1 | Resource row | 11,600 USD |
| Line 2 | 10% markup of resource row 1 | 1,160 USD |
| Line 3 | Resource row | 40, 000 USD |
| Line 4 | 10% markup of resource row 2 | 4,000 USD |

For more information on the Get Plan process, refer to PeopleSoft Project Costing's budgeting process.

Chapter 7

Preparing, Generating, and Viewing Proposal Information

Preparing and Generating Proposal Information

This section discusses how to prepare and generate proposal information.

Page Used to Prepare and Generate Proposal Information

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i> | <i>Usage</i> |
|-------------------|------------------------|--|-------------------------------------|
| Maintain Proposal | GM_OPPTY_HDR | <ul style="list-style-type: none">Proposal Management, Proposal Management Center, Proposal Management, Maintain ProposalProposal Management, Proposal and Version, Maintain Proposal | Enter general proposal information. |

Maintain Proposal Page

Use the Maintain Proposal page (GM_OPPTY_HDR) to enter general proposal information.

Navigation

- Proposal Management, Proposal Management Center, Proposal Management, Maintain Proposal
- Proposal Management, Proposal and Version, Maintain Proposal

Image: Maintain Proposal page

This example illustrates the fields and controls on the Maintain Proposal page. You can find definitions for the fields and controls later on this page.

Maintain Proposal

Proposal: CON000000000025

*Description: Implementation services quote

*Customer: Alliance Group

Proposal Contact: Angelini, Gina

Proposal Planner: Miller, William

Generate Status: Not Generated

*Status: 01 - Draft

Confidence Pct: 90

*Start Date: 03/01/2005

Proposal Due Date: 02/15/2005

*Currency: USD

*End Date: 02/28/2006

Add to My Proposals

Generate

Pre-Spending

Process Monitor

Comments

Version

Personalize | Find | First 1-3 of 3 Last

| Version | Description | Copy Version | Cost Amount | Bill Amount | Proposed Amount | Labor Adjustment Percent | Nonlabor Adjustment Percent | Labor Margin Percent | Nonlabor Margin Percent |
|---------|-----------------------|--------------|-------------|-------------|-----------------|--------------------------|-----------------------------|----------------------|-------------------------|
| V101 | Oracle Implementation | | 153,298.80 | 249,798.80 | 249,798.80 | | | 38.68 | |
| V102 | Oracle Implementation | | 73,149.90 | 119,649.90 | 113,674.90 | -5.00 | | 35.70 | |
| V103 | Oracle Implementation | | 216,298.80 | 344,298.80 | 309,898.80 | -10.00 | | 30.23 | |

Go To Labor Configuration Set Up Options

* Required Fields

Note: For proposals that you initiated from PeopleSoft Customer Relationship Management (CRM), the Status field on this page is view-only. The system displays the Ready button when the proposal is in *Draft* status. Click this button to change the proposal status to *Ready* and launch an enterprise integration point (EIP) that updates the status in PeopleSoft CRM. All other status changes are prompted by an EIP.

Proposal

This is a display-only field. When you add a new proposal, the system displays *NEXT*. This automatically generates a system-assigned ID when you save the proposal. The system-assigned ID is derived from the Contracts table and remains the same throughout the Contract Generation process so that both the proposal and the contract in PeopleSoft Contracts have the same ID.

After you run the Generate process, the system turns this field into a link that enables you to access the contract on the Contract - General page in PeopleSoft Contracts.

Status

Select a value to specify the state of the proposal. Options are:

- *Draft*: Select when you are in the process of developing the proposal. This status appears by default when you first access this page. You can initiate the Pre-Spending process in this status if you have created one or more projects for the proposal.

- *Ready*: Select if you are ready to submit the proposal. You can initiate the Pre-Spending process in this status if you have created one or more projects for the proposal.
- *Committed*: Select if the proposal was accepted. At this point you cannot edit the proposal further. You can initiate the Pre-Spending or Contract Generation processes. You can change the status to *Committed* only if the proposal is in *Ready* status.

Note: You cannot commit a proposal if the proposed amount is equal to zero.

- *Denied*: Select if the proposal has been denied. You can change the status to *Denied* only if the proposal is in the *Ready* status.
- *Canceled*: Select to cancel the proposal. You can change the status to *Canceled* only if the proposal is in *Draft* or *Ready* status.

Confidence Pct (confidence percentage)

Enter a number between 1 and 100 to reflect your level of confidence that the proposal will be approved. The proposal planner usually enters or provides this number. The system translates the number that you enter here into a color-coded icon that represents the confidence level as either high, medium, or low.

You determine confidence levels on the Contracts Business Unit - Confidence Level Setup page. The colored icon next to this field indicates the confidence level of this proposal.



Indicates a low confidence level.



Indicates a medium confidence level.



Indicates a high confidence level.

Currency

Select the currency to use in financial transactions if the proposal results in a contract. This code defaults from the Currency Code field that you selected on the Contracts BU Definition page during implementation.

Customer

Select the customer for whom you are creating the proposal.

Start Date and End Date

Select the estimated start and end dates of the project that you are proposing.

Proposal Contact

Select the person who is the contact for the proposal.

Proposal Due

Select the date on which the proposal is due for completion by the proposal planner. This date must be less than the proposal target date.

Proposal Planner

Select the name of the person who is drafting or planning the proposal.

Generate Status

Displays a status based on the processes that you have run, either Pre-Spending or Contract Generation. Values are:

- *Not Generated.*
- *Pre-Spending:* Only the selected version is editable.

If you initiated the Pre-Spending process when the proposal was in the *Draft* or *Ready* status, you can add new projects and activities. You cannot delete existing projects and activities, although you can add or delete detail lines. You cannot select a different version of the proposal from the one that you selected for the Pre-Spending process, as the system has already created the projects and activities in PeopleSoft Project Costing for the selected version and has also established contract and project IDs.

If you are going to generate a contract from the proposal, then you must use the version of the proposal that was selected when you initiated Pre-Spending.

If you initiated the Pre-Spending process when the proposal was in *Committed* status, you cannot edit the proposal. To generate a contract, you must use the version of the proposal that was selected when you initiated Pre-Spending.

- *Contract Generated:* The system has generated proposal information into tables in PeopleSoft Project Costing and PeopleSoft Contracts. The proposal must contain one or more projects before you can generate a contract, and the proposal must be in *Committed* status.

Add to My Proposals

Click to add the proposal to the My Proposal page.

See [Using the My Proposals Page](#).

Pre-Spending

Click to initiate the Pre-Spending process. The Pre-Spending process creates the selected projects in PeopleSoft Project Costing with a project status of *Approved* and a processing status of *Active*. The system also creates the corresponding activities. The system also displays a green check mark next to the version that you selected for pre-spending. The Pre-Spending process does not create a contract or generate any budget lines.

When you run the Generate process, the system creates the contract and adds new activities with the appropriate dollar amounts.

Note: The Pre-Spending process creates Project IDs and activities; it does not generate any budget lines or any contract entities.

Generate

Click to generate a contract from the information that is entered on the proposal for the selected version. The system creates projects in PeopleSoft Project Costing based on the information that you enter on the Resource Estimate and Maintain Version Estimate Detail pages. The system also displays a green check mark next to the version that you selected for pre-spending.

Comments

Type

Select the type of comment that you want to enter. Options are: *Assumptions*, *Deliverables*, *Dependencies*, *Goals*, *Notes*, *Objectives*, *Purpose*, or *Risks*. You can add each comment type only once.

Description

Enter the text of your comment. To add another comment, add a new row.

Version: Overall Summary Tab

Version

Displays the versions associated with the proposal. You can select only one version for approval and eventually generate it into a contract.

Click the version link to access the Resource Estimate page to view, add, or modify project information.



Click the Copy Version Information to New Version button to access the Copy Version page and copy the information to a new proposal version within the same proposal.

Cost Amount, Bill Amount, and Proposed Amount

Displays the total cost, total billing amount, and total amount that you propose to charge for both labor and non-labor for the proposal version, after adjustments.

Labor Adjustment Percent

Displays the percent amount that you entered in the Adjustment Percent field on the Labor Summary tab for overall time adjustments. This number applies to all activities that are included in the proposal version for labor detail lines only. It can be either a positive or a negative percentage.

Nonlabor Adjustment Percent

Displays the percent amount that you entered in the Adjustment Percent field on the Non-labor Summary tab for overall expense adjustments. This number applies to all activities that are

included in the proposal version for non-labor detail lines only.
It can be either a positive or a negative percentage.

Labor Margin Percent

Displays as a percentage the difference between the proposed amount and the cost amount for labor (*Proposed Amount – Cost Amount*) ÷ *Proposed Amount*.

Nonlabor Margin Percent

Displays as a percentage the difference between the proposed amount and the cost amount for non-labor expenses (*Proposed Amount – Cost Amount*) ÷ *Proposed Amount*.

Version: Labor Summary Tab

Adjustment Percent

Enter the percent (either positive or negative) by which to make an overall adjustment to the proposed amount for labor.
The number that you enter here applies to all activities in the proposal version for labor detail lines only.

Margin Percent

Displays as a percentage the difference between the proposed amount and the cost amount for labor (*Proposed Amount – Cost Amount*) ÷ *Proposed Amount*.

Version: Non-labor Summary Tab

Adjustment Percent

Enter the percent (either positive or negative) by which to make an overall adjustment to the proposed amount for non-labor expenses. The number that you enter here applies to all activities in the proposal version for non-labor detail lines only.

Margin Percent

Displays as a percentage the difference between the proposed amount and the cost amount for non-labor expenses (*Proposed Amount – Cost Amount*) ÷ *Proposed Amount*.

Configuring Labor Defaults, Bill Options, and Security

This section discusses how to:

- Configure proposal labor defaults.
- Set up proposal bill options and security.

Pages Used to Configure Labor Defaults, Bill Options, and Security

| Page Name | Definition Name | Navigation | Usage |
|---------------------|------------------------|---|--|
| Labor Configuration | GM_OPPTY_HDR_HRS | Proposal Management, Proposal and Version, Maintain Proposal Click the Labor Configuration link on the Maintain Proposal page. | Enter activity time. |
| Set Up Options | GM_OPPTY_HDR_SEC | Proposal Management, Proposal and Version, Maintain Proposal. Click the Set Up Options link on the Maintain Proposal page | View customer contact information, set security options, and select billing options. |

Labor Configuration Page

Use the Labor Configuration page (GM_OPPTY_HDR_HRS) to enter activity time.

Navigation

Proposal Management, Proposal and Version, Maintain Proposal

Click the Labor Configuration link on the Maintain Proposal page.

Image: Labor Configuration page

This example illustrates the fields and controls on the Labor Configuration page. You can find definitions for the fields and controls later on this page.

The screenshot shows a web form titled "Labor Configuration". Below the title is a dropdown menu labeled "Set Activity Time As" with the word "Hours" selected. At the bottom of the form are two buttons: "OK" and "Cancel".

Set Activity Time As

Select a value to specify how to calculate time on the proposal. The value that you select here appears as the column heading on the Units tab on the Maintain Version Estimate Detail page.

- *Hours*
- *Weeks*
- *Start/End Date*

Note: PeopleSoft Proposal Management does not enable you to change the value in this field if you have already created budget detail lines for the activities on the proposal.

Set Up Options Page

Use the Set Up Options page (GM_OPPTY_HDR_SEC) to view customer contact information, set security options, and select billing options.

Navigation

Proposal Management, Proposal and Version, Maintain Proposal.

Click the Set Up Options link on the Maintain Proposal page

Image: Set Up Options page

This example illustrates the fields and controls on the Set Up Options page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Set Up Options' page with the following sections:

- Proposal Target:** A date field set to 03/01/2005 with a calendar icon.
- Customer Contact:** A section containing fields for Contact Name (Paula Smith), Address (14410 Union Ave, San Jose, CA 95124), Telephone (888/967-2253), and Email (psmith@genericemail.com).
- Security:** A section with two sub-sections:
 - By Department:** A dropdown menu for Department.
 - By Individual:** A section with a table for Employee Name. The table has a header row with 'Employee Name' and a search icon. Below the header is a row with the number '1' and a search icon. There are also 'First', 'Last', and '1 of 1' navigation controls.
- Estimate Bill Options:** A section with two sub-sections:
 - Create Budget Options:** A section with four radio buttons: 'Bill and Cost Rows' (selected), 'Bill Rows', 'Cost Rows', and 'None'.
 - Create Rate Options:** A section with three radio buttons: 'Bill and Cost Rows' (selected), 'Bill Rows', and 'Cost Rows'.

Proposal Target

Select the estimated approval date. This date must be greater than current date.

Customer Contact

Displays name, address, telephone, email, and information for the contact person at the customer site. The data displayed in this section is customer sold-to information.

Estimate Bill Options

When you initiate the Generate process, the system brings forward each item entered on the Maintain Version Estimate Detail page into the Budget Detail page in PeopleSoft Project Costing. The items appear in the budgets grid as distinct lines.

The system also generates cost and bill rows for each labor and non-labor detail. Additionally, the system groups all of the cost and bill rows together within the budgets grid.

To control the type of information that the system creates during the Contract Generation process, select the values that correspond to your business needs.

Create Budget Options

Select a value to specify the types of budget transactions that you want the system to create in PeopleSoft Project Costing when you run the Contract Generation process from the Maintain Proposal page. Options are:

- *Bill and Cost Rows*
- *Bill Rows*
- *Cost Rows*
- *None*

Create Rate Options

Select a value to specify the types of rate set target rows that you want to create for the rate set that the system will use for billing in Contracts. Options are:

- *Bill and Cost Rows*
- *Bill Rows*
- *Cost Rows*

Security

To enable security you must first select *Yes* in the Security group box on the Contracts BU Setup page. When you select *Yes*, the list of users who can view a proposal includes only those to whom you have given security access to use the fields.

The system uses both the Department and the Employee Name fields as security filters.

Department

Use this field to limit access to the proposal by department. The system gives everyone in the department view access to the proposal.

Employee Name

Use this field to limit access to the proposal by employee. To add multiple employees, click the Add button.

Entering Resource Estimates

This section discusses how to:

- Create labor and resource estimates.
- Make adjustments to the bill rate.

- Create expense estimates.
- Enter project control details.
- Add attachments.
- Add key words.
- View time and expense summary information.

Pages Used to Enter Labor and Non-Labor Estimates

| Page Name | Definition Name | Navigation | Usage |
|----------------------------------|------------------------|---|--|
| Maintain Proposal | GM_OPPTY_HDR | <ul style="list-style-type: none"> • Proposal Management, Proposal Management Center, Proposal Management, Maintain Proposal • Proposal Management, Proposal and Version, Maintain Proposal | Enter general proposal information. |
| Resource Estimate | GM_PM_RSRC_EST | Click the Version link on the Maintain Proposal page. | Create or modify project and activity information. You can also view the total bill and cost amounts by activity. |
| Maintain Version Estimate Detail | GM_OPPTY_DTL | Click the Activity button in the Activity Summary grid on the Resource Estimate page. | Enter resource information. |
| Bill Estimate - Resource Note | GM_SCEN_LINE_NOTE | Click the Notes button in the Resources grid on the Maintain Version Estimate Detail page. | View or modify information about the resource line. |
| Current Bill Rate | GM_ADJUSTB_SECPNL | Click the Adjust Current Limit Bill Rate button in the Resources - Cost grid on the Maintain Version Estimate Detail page. | Make adjustments to the billing rate. |
| Project Control | GM_OPPTY_PRJCT_CTL | Proposal Management, Proposal and Version, Maintain Version Estimate Click the Project Control link on the Resource Estimate page. | Displays high-level project information. You can change the PeopleSoft Project Costing business unit, type, and manager. |
| Attachments | GM_OPPTY_DOC1 | Click the Attachments and Keywords link on the Resource Estimate page. | Add documents to the proposal. |

| Page Name | Definition Name | Navigation | Usage |
|------------------|------------------------|---|--|
| Keywords | GM_OPPTY_KEYWORD | Click the Attachments and Keywords link on the Resource Estimate page; then click the Keywords tab. | Add keywords to the proposal. |
| Summary | GM_OPPTY_SUMMARY | Proposal Management, Proposal and Version, Maintain Version Estimate, Summary | View time and expense information at the project, activity, and overall time and expense levels. |

Resource Estimate Page

Use the Resource Estimate page (GM_PM_RSRC_EST) to create or modify project and activity information.

You can also view the total bill and cost amounts by activity.

Navigation

Click the Version link on the Maintain Proposal page.

Image: Resource Estimate page

This example illustrates the fields and controls on the Resource Estimate page. You can find definitions for the fields and controls later on this page.

The screenshot displays the 'Resource Estimate' page with a 'Summary' tab selected. At the top, it shows 'Proposal CON0000000000025' with the description 'Implementation services quote' and 'Currency USD'. Below this, 'Version V101' is shown with the description 'Oracle Implementation'. The 'Project Information' section includes 'Project 000000000000160' with the description 'Implementation', and displays 'Total Cost 153,298.80' and 'Total Bill 249,798.80'. There are links for 'Copy Project' and 'Project Control'. The 'Activity Summary' table lists one activity: 'CONSULTATION' with description 'Consultation on scope', 'Total Cost 153,298.80', 'Total Bill 249,798.80', and 'Margin Percent 38.63'. The page includes navigation links at the bottom: 'Return to Maintain Proposal' and 'Go To Attachments and Keywords'.

Project Information

Project

Display-only. If you are adding a new project, the system displays *NEXT*. This automatically generates a system-assigned ID when you save the proposal version. This ID is derived from the Projects table and remains the same throughout the generation process. Upon generation, both the Proposal ID and the Project ID remain in sync with the Contract and Project IDs.

After you run the Contract Generation or the Pre-Spending process, the system turns this field into a link that you can

| | |
|---------------------------------|--|
| | click to access the Project General page in PeopleSoft Project Costing. |
| Copy Project | Click to access the Copy Project page. The system makes this field display only after you initiate the Contract Generation process. |
| | <hr/> Note: You can copy projects within a proposal after you run the Pre-Spending process. If the proposal is in a <i>Committed</i> status, however, the system locks down the proposal and you can no longer add projects. <hr/> |
| | See Understanding the Copy Functionality in PeopleSoft Proposal Management . |
| Project Control | Click to access the Project Control page, which contains PeopleSoft Project Costing related fields that the system uses in the project creation process. |
| | See Project Control Page . |
| Activity Summary | |
| Activity | Select an activity type to add to the project that you are creating. You can select an activity type from the list or enter a new one (which does not appear in the prompt list). Activity cannot be <i>NEXT</i> . If the activity is not listed, enter a description for the activity in the field. After you run the Contract Generation or the Pre-Spending process, the system turns this field into a link that you can click to access the activity in PeopleSoft Project Costing. |
| Description | Enter text to describe the activity that you are adding to the project. |
| Total Cost | Displays the total cost contained in the project across all activities. |
| Total Bill | Displays the total bill amount contained in the project across all activities. |
| Margin Percent | Displays as a percentage the difference between the total bill and the total cost for activities $(Total\ Bill - Total\ Cost) \div Total\ Cost$. |
| Attachments and Keywords | Click to access the Attachments and Keywords pages. |

Maintain Version Estimate Detail Page

Use the Maintain Version Estimate Detail page (GM_OPPTY_DTL) to enter resource information.

Navigation

Click the Activity button in the Activity Summary grid on the Resource Estimate page.

Image: Maintain Version Estimate Detail page

This example illustrates the fields and controls on the Maintain Version Estimate Detail page. You can find definitions for the fields and controls later on this page.

Maintain Version Estimate Detail

| | | | |
|-----------------|------------------|---|-------------------------------|
| Proposal | CON0000000000025 | Description | Implementation services quote |
| Version | V101 | Description | Oracle Implementation |
| Project | 000000000000160 | Description | Implementation |
| Activity | CONSULTATION | Description | Consultation on scope |
| *Pricing Method | As Incurred | *Product | PPSL_MGMT_RATE |
| Total Cost | 153,298.80 | Total Bill | 249,798.80 |
| *View Class(es) | All | Currency | USD |
| | | <input type="button" value="Calculate Totals"/> | |
| | | <input type="checkbox"/> Create Resources Team | |

[Return to Maintain Version Estimate](#)

| Resources | | | | | | | | Personalize | Find | First | 1-4 of 4 | Last |
|----------------|---------------|--------------------------------|-------------|--------------|-----------------|-------------|-------|-------------|------|-------|----------|------|
| Resource Class | Asset or Item | Resource Name | Region Code | Project Role | Resource Pool | Budget Item | Notes | | | | | |
| Labor | | | | PROJ MANAGER | Unassigned Pool | SALARY | | | | | | |
| Labor | | | | FUNC ANALYST | Unassigned Pool | SALARY | | | | | | |
| Asset | ITZ105 | Compaq Armada M700 | | | Unassigned Pool | EQUIP | | | | | | |
| Material | 10005 | Refrigerator, Inside Heat Exch | | | Unassigned Pool | SUPL | | | | | | |

Project

Click to access the General Information page.

Pricing Method

Select a value to specify the way in which the system prices the activity. When you run the Generate process, the system passes this information to PeopleSoft Contracts.

- As Incurred:** The as-incurred method is transaction-based. This is the only method that is used for rate-based contract lines. As Incurred applies to the contract line and to both revenue recognition and billing.
- Fixed:** Select to use a fixed-amount contract line for a product or service for which you charge a fixed amount. Fixed-amount contract lines have a price type of *Amount* or *Percent*. For fixed-amount contract lines, you associate the contract line with a revenue recognition plan that has a revenue recognition method of *Apportionment*, *Milestone*, or *Percent Complete*. Fixed applies to the contract line and to both revenue recognition and billing.

After you initiate the Pre-Spending or Generate process, this field is display-only.

Product

The entry in this field appears by default from the Contracts BU Setup page and is based on the value you select for the Pricing Method field. If you select a new value in the Pricing Method field, the entry in this field changes accordingly. You define products on the Product Definition pages and in PeopleSoft

Contracts. The product you select here is used for billing purposes in PeopleSoft Contracts after you run the Contract Generation process.

See [Understanding Products](#).

Total Cost

Displays the total cost contained in the project for the activity.

Total Bill

Displays the total bill amount contained in the project for the activity.

Calculate Totals

Click to refresh the Total Cost and Total Bill amounts prior to saving the estimate. The system also updates Total Cost and Total Bill amounts when you save.

View Class(es)

Select to view specific Resource Classes on the Resources tab.

Create Resources Team

Select to have the system create a project team on the pages in the Project Team component in PeopleSoft Project Costing. When you save the proposal, the system creates the information in PeopleSoft Project Costing.

Resources - Resources Tab

Resource Class

Select a resource class. Options are *Asset*, *Labor*, *Material*, and *Other*.

Asset or Item

Select an asset or item if you selected *Asset* or *Material* resource class.

Resource Name

Enter the person's name or text to describe the team member whom you are adding to the activity. When you create the resources team, the system concatenates the value in the Resource Name field with a system-generated sequence number.

Project Role

Select the role of the person who will work on the activity that you are creating. Project roles are tied to cost and bill rates. When you select a project role, the system automatically fills in the Unit Cost Rate and Unit Bill Rate fields on the Resources - Cost tab.

Note: If the Project Role is set up in the project pricing structure, the system fills in the Unit Cost Rate and Unit Bill Rate fields. If rate is not set up, the system displays a warning message.

Budget Item

Select to identify a budget item with the resource class.



Click the Notes button to access the Resource Note page.

Resources - Units Tab

Start Date

Displays the start date that you entered in the Start Date field on the Maintain Proposal page. You can change the start date here for the project role, but it cannot be greater than the end date.

End Date

Displays the end date that you entered in the End Date field on the Maintain Proposal page. You can change the end date here for the project role, but it cannot be less than the start date.

Unit of Measure

Select a unit of measure.

Hours

Enter the number of hours for the labor resource class row.

Resources - Cost Tab

QTY (quantity)

Enter the number of people who will work on the activity who will have the role that you selected.

Unit Cost Rate

Display-only. Indicates the per-hour rate that you are paying the people assigned to the project role.

Unit Bill Rate

Display-only. Indicates the per hour rate that you are billing the customer for the people assigned to the project role.

Actual Bill Rate

Display-only. Indicates the Unit Bill Rate plus or minus any adjustments made on the Current Bill Rate page.

Adjust

Click to access the Bill Estimate - Current Bill Rate page. You can use this page to make adjustments to the bill rate as a flat amount, as a percentage, or as a new rate.

Note: All rates must be greater than zero after the adjustment is made. A rate can not be negative number.

See [Current Bill Rate Page](#).

Bill Estimate - Resource Note Page

Use the Bill Estimate - Resource Note page (GM_SCEN_LINE_NOTE) to view or modify information about the resource line.

Navigation

Click the Notes button in the Resources grid on the Maintain Version Estimate Detail page.

Image: Bill Estimate - Resource Note page

This example illustrates the fields and controls on the Bill Estimate - Resource Note page.

Resource Note

Activity CONSULTATION Description Consultation on scope

Resource Class Labor Resource Name Budget Item SALARY

Comments

OK Cancel

Current Bill Rate Page

Use the Current Bill Rate page (GM_ADJUSTB_SECPNL) to make adjustments to the billing rate.

Navigation

Click the Adjust Current Limit Bill Rate button in the Resources - Cost grid on the Maintain Version Estimate Detail page.

Image: Bill Estimate - Current Bill Rate

This example illustrates the fields and controls on the Bill Estimate - Current Bill Rate. You can find definitions for the fields and controls later on this page.

Current Bill Rate

Unit Bill Rate 310.00

Adjust Bill Rate 310.00

Adjust Bill Rate

☐ Flat Amount 0.00

☐ Percentage 0.00

☐ New Rate 0.00

☒ No Adjustment

☒ Apply Rate to all Resource lines with same Region/Project Role

☐ Apply Rate to current Resource line

OK Cancel

Unit Bill Rate

Displays the rate that you are billing for the person who is assigned to the project role.

Adjust Bill Rate

Displays the new rate based on the adjustments you made.

Flat Amount

Enter the number by which to adjust the rate, either a positive or a negative number. When you click OK and then save the page, the system adjusts the rate by the number that you enter. (Adjustment Bill Rate = Bill Rate + Flat Amount)

Percentage

Enter the percentage by which you want to adjust the rate, either a positive or a negative number. When you click OK and then save the page, the system adjusts the rate by the number that you enter. Adjustment Bill Rate = Bill Rate * (100 + Percentage)/100

New Rate

Enter the number that you want the system to use to calculate the proposed bill amount for the people who are assigned to the project role. You can only enter a positive number. When you click OK and then save the page, the system changes the rate to the number that you enter. Adjustment Bill Rate = New Rate

No Adjustment

Select this option if you want the system to use the original rate when it calculates the proposed bill amount for the project role.

- Apply Rate to all Resource lines with same Region/Project Role** Select this option if you want to apply this rate to all the resource lines with the same region and project role in the current activity.
- Apply Rate to current Resource line** Select this option if you want to apply the rate only to the current resource row.

Project Control Page

Use the Project Control page (GM_OPPTY_PRJCT_CTL) to displays high-level project information.

You can change the PeopleSoft Project Costing business unit, type, and manager.

Navigation

Proposal Management, Proposal and Version, Maintain Version Estimate

Click the Project Control link on the Resource Estimate page.

Image: Project Control page

This example illustrates the fields and controls on the Project Control page. You can find definitions for the fields and controls later on this page.

Project Control

Proposal CON000000000025

Version V101 Oracle Implementation

Project 000000000000160 Implementation

Detail

PC Business Unit US001 US001 NEW YORK OPERATIONS

Project Type SALES Sales

Project Manager Miller, William

Project Calendar 01 Standard Business Calendar

Hours Per Day 8.00 MHR

Hours Per Week MHR

[Return to Maintain Version Estimate](#)

Note: When you initially enter proposal information, the link to this page is not available until you enter information in the Time Estimate and Expense Estimate pages, save the pages, and then return to the Time Estimate page from the Maintain Proposal page.

Detail

PC Business Unit (project costing business unit)

Displays the PeopleSoft Project Costing business unit that you selected when you set up the PC business unit. To control the project using another PeopleSoft Project Costing business unit,

select a new one. The value in the PC Business Unit field cannot be changed if you have created detail lines for Time or Expense, or when the project team has been created.

Note: You cannot change the PC Business Unit after the system creates a project team, after you initiate Pre-Spending, or after you change the proposal to the *Committed* status.

Project Type

Select the type of project that you are adding to the proposal. You set up project types in PeopleSoft Project Costing.

Project Manager

Select the name of the person who is the manager of the project.

Attachments Page

Use the Attachments page (GM_OPPTY_DOC1) to add documents to the proposal.

Navigation

Click the Attachments and Keywords link on the Resource Estimate page.



Click the Add Attachment icon to add a document to the proposal. Click Browse to locate the document on your system and then click Upload to attach the document to the proposal and return to the Attachments page.



Click the Delete Attachment button to delete an attached document.



Click the View Attachment button to display the contents of the attached document.

Return to Maintain Version Estimate Click to return to the Resource Estimate page.

Keywords Page

Use the Keywords page (GM_OPPTY_KEYWORD) to add keywords to the proposal.

Navigation

Click the Attachments and Keywords link on the Resource Estimate page; then click the Keywords tab.

Image: Keywords page

This example illustrates the fields and controls on the Keywords page. You can find definitions for the fields and controls later on this page.

Attachments Keywords

Proposal CON000000000025 Implementation services quote

Version V101 Oracle Implementation

Key Word Detail Personalize | Find | First 1 of 1 Last

| | *Keywords | Description | | |
|---|----------------------|-------------|--|--|
| 1 | <input type="text"/> | | | |

[Return to Maintain Version Estimate](#)

Keyword

Select the word that you want to associate with the proposal.



Click the Add Keyword button to access the Proposal Key Words page to enter new words that you can then associate with proposals.

Return to Maintain Version Estimate Click to return to Resource Estimate page.

Summary Page

Use the Summary page (GM_OPPTY_SUMMARY) to view time and expense information at the project, activity, and overall time and expense levels.

Navigation

Proposal Management, Proposal and Version, Maintain Version Estimate, Summary

Image: Summary page (1 of 2)

This example illustrates the fields and controls on the Summary page (1 of 2). You can find definitions for the fields and controls later on this page.

| Resource Estimate | | Summary | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---|-----------------|-------------------------------|--------------------------------|--------------|-------------|----------------|---------------|--------------|-------------|-----------|-------------|----------------|-------------|-----------|-------------|----------------|--------------------|--------------|-------|--|--------------|--------|---|-----|--------|-----------|--------|------------|-------|--------------------|--------------|-------|--|--------------|--------|---|-----|--------|-----------|--------|-----------|-------|--------------------|--------------|-------|--------------------|--|-------|---|--|------|------|------|------|------|--------------------|--------------|----------|--------------------------------|--|------|-----|--|------|--------|------|--------|------|
| Proposal | CON000000000025 | Implementation services quote | Currency USD | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Version | V101 | Oracle Implementation | Start Date 03/01/2005 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | End Date 02/28/2006 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| *Summary By Proposal | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Total Cost Amount | 153,298.80 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Total Bill Amount | 249,798.80 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Total Adjustment Amount | 0.00 | | Labor Overall Margin 38.68 % | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Total Proposed Amount | 249,798.80 | | Nonlabor Overall Margin 0.00 % | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <div> <div>Detail</div> <div> <div>Personalize Find First 1-4 of 4 Last</div> <table border="1"> <thead> <tr> <th>Project ID</th> <th>Activity ID</th> <th>Resource Class</th> <th>Resource Name</th> <th>Project Role</th> <th>Budget Item</th> <th>Qty</th> <th>Hours</th> <th>Cost Rate</th> <th>Cost Amount</th> <th>Bill Rate</th> <th>Bill Amount</th> <th>Margin Percent</th> </tr> </thead> <tbody> <tr> <td>1 0000000000000160</td> <td>CONSULTATION</td> <td>Labor</td> <td></td> <td>PROJ MANAGER</td> <td>SALARY</td> <td>1</td> <td>500</td> <td>180.00</td> <td>90,000.00</td> <td>310.00</td> <td>155,000.00</td> <td>41.94</td> </tr> <tr> <td>2 0000000000000160</td> <td>CONSULTATION</td> <td>Labor</td> <td></td> <td>FUNC ANALYST</td> <td>SALARY</td> <td>1</td> <td>450</td> <td>140.00</td> <td>63,000.00</td> <td>210.00</td> <td>94,500.00</td> <td>33.33</td> </tr> <tr> <td>3 0000000000000160</td> <td>CONSULTATION</td> <td>Asset</td> <td>Compaq Armada M700</td> <td></td> <td>EQUIP</td> <td>1</td> <td></td> <td>1.00</td> <td>1.00</td> <td>1.00</td> <td>1.00</td> <td>0.00</td> </tr> <tr> <td>4 0000000000000160</td> <td>CONSULTATION</td> <td>Material</td> <td>Refrigerator, Inside Heat Exch</td> <td></td> <td>SUPL</td> <td>100</td> <td></td> <td>2.98</td> <td>297.80</td> <td>2.98</td> <td>297.80</td> <td>0.00</td> </tr> </tbody> </table> </div> </div> | | | | Project ID | Activity ID | Resource Class | Resource Name | Project Role | Budget Item | Qty | Hours | Cost Rate | Cost Amount | Bill Rate | Bill Amount | Margin Percent | 1 0000000000000160 | CONSULTATION | Labor | | PROJ MANAGER | SALARY | 1 | 500 | 180.00 | 90,000.00 | 310.00 | 155,000.00 | 41.94 | 2 0000000000000160 | CONSULTATION | Labor | | FUNC ANALYST | SALARY | 1 | 450 | 140.00 | 63,000.00 | 210.00 | 94,500.00 | 33.33 | 3 0000000000000160 | CONSULTATION | Asset | Compaq Armada M700 | | EQUIP | 1 | | 1.00 | 1.00 | 1.00 | 1.00 | 0.00 | 4 0000000000000160 | CONSULTATION | Material | Refrigerator, Inside Heat Exch | | SUPL | 100 | | 2.98 | 297.80 | 2.98 | 297.80 | 0.00 |
| Project ID | Activity ID | Resource Class | Resource Name | Project Role | Budget Item | Qty | Hours | Cost Rate | Cost Amount | Bill Rate | Bill Amount | Margin Percent | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1 0000000000000160 | CONSULTATION | Labor | | PROJ MANAGER | SALARY | 1 | 500 | 180.00 | 90,000.00 | 310.00 | 155,000.00 | 41.94 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2 0000000000000160 | CONSULTATION | Labor | | FUNC ANALYST | SALARY | 1 | 450 | 140.00 | 63,000.00 | 210.00 | 94,500.00 | 33.33 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 3 0000000000000160 | CONSULTATION | Asset | Compaq Armada M700 | | EQUIP | 1 | | 1.00 | 1.00 | 1.00 | 1.00 | 0.00 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 4 0000000000000160 | CONSULTATION | Material | Refrigerator, Inside Heat Exch | | SUPL | 100 | | 2.98 | 297.80 | 2.98 | 297.80 | 0.00 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

Image: Summary page (2 of 2)

This example illustrates the fields and controls on the Summary page (2 of 2). You can find definitions for the fields and controls later on this page.

| | | | |
|----------------------------|------------|-----------------------------|---------|
| Labor Cost Amount | 153,000.00 | | |
| Labor Bill Amount | 249,500.00 | | |
| Labor Adjustment Amount | 0.00 | Labor Adjustment Percent | 0.00 % |
| Labor Proposed Amount | 249,500.00 | Labor Overall Margin | 38.68 % |
| Nonlabor Cost Amount | 298.80 | | |
| Nonlabor Bill Amount | 298.80 | | |
| Nonlabor Adjustment Amount | 0.00 | Nonlabor Adjustment Percent | 0.00 % |
| Nonlabor Proposed Amount | 298.80 | Nonlabor Overall Margin | 0.00 % |

[Return To Maintain Proposal](#)

This page summarizes detailed and overall resource information by activity and by project.

Summary By

Select a value to change the way that the system displays time and expense information. Options are:

- *Activity.*
- *Project.*
- *Proposal.*

Using the My Proposals Page

This section discusses how to:

- View proposal information.
- Add and remove proposals from the My Proposal page.

Pages Used to View, Add, and Remove Proposals

| Page Name | Definition Name | Navigation | Usage |
|------------------------------|-----------------|--|--|
| My Proposals | GM_MY_PROPOSAL | Proposal Management, My Proposals | View proposal information on the My Proposals page. |
| Add/Remove from My Proposals | GM_MYOPP_ADD | Proposal Management, My Proposals. Click the Edit List link on the My Proposals page. | Add proposals to and remove them from the My Proposals list. |

My Proposals Page

Use the My Proposals page (GM_MY_PROPOSAL) to view proposal information on the My Proposals page.

Navigation

Proposal Management, My Proposals

Image: My Proposals page

This example illustrates the fields and controls on the My Proposals page. You can find definitions for the fields and controls later on this page.

My Proposals

Smith, Jane

| Current Proposals | | | | | |
|-------------------------------|-------------|--------|--------------------|-------|-----------------|
| Personalize Find View All | | | | | |
| First 1 of 1 Last | | | | | |
| Proposal | Description | Status | Confidence Percent | Alert | Proposal Target |
| Proposal | | | | | |

Create New Proposal

| Version | | | | | |
|---------|-------------|----------|-----------------|-------------|---------------------|
| Version | Description | Currency | Proposed Amount | Cost Amount | Time Overall Margin |
| V101 | | | | | |

Edit List



Click the View All related Version Data button to display version information for the proposal.

| | |
|----------------------------|---|
| Proposal | Click to access the Maintain Proposal page to view that proposal. |
| Alert | Displays a red square, yellow triangle, or green diamond to indicate the alert level. |
| Create New Proposal | Click to access the Maintain Proposal page to add a new proposal. |
| Version | Click to access the Resource Estimate page that is associated with the proposal. |
| Edit List | Click to access the Add/Remove from My Proposals page. |

Add/Remove from My Proposals Page

Use the Add/Remove from My Proposals page (GM_MYOPP_ADD) to add proposals to and remove them from the My Proposals list.

Navigation

Proposal Management, My Proposals.

Click the Edit List link on the My Proposals page.

Image: Add/Remove from My Proposals page

This example illustrates the fields and controls on the Add/Remove from My Proposals page. You can find definitions for the fields and controls later on this page.

Add/Remove from My Proposals

Smith, Jane

Enter criteria for finding Proposals. A "%" can be used in the Proposal description to indicate any value.

Proposal Description

Customer

Proposal Contact

| Proposal List | | | | |
|--------------------------|-----------------|-------------------------------|----------------|------------------|
| Select | Proposal ID | Title | Customer | Proposal Contact |
| <input type="checkbox"/> | CON000000000025 | Implementation services quote | Alliance Group | Angelini, Gina |
| <input type="checkbox"/> | CON000000000029 | Implementation services quote | Alliance Group | Angelini, Gina |

Proposal Description, Customer, and Proposal Contact

Enter or select information to search for proposals. To find proposals using a partial value, enter the percent sign as a wildcard in the Proposal Description field.

For example, to find all proposals beginning with *Implementation*, enter *%Implementation*. This search function is case sensitive.

Select

Select to add proposals to the My Proposals page. To remove proposals, deselect this check box.

Viewing CRM-Related Information

This section discusses how to view CRM-related information.

Page Used to View CRM-Related Information

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i> | <i>Usage</i> |
|--------------------------------|------------------------|--|--|
| Additional Information for CRM | GM_OPPTY_HDR_CRM | Proposal Management, Proposal and Version, Maintain Proposal Click the Additional Information link on the Maintain Proposal page. | View CRM-related information for the proposal. |

Additional Information for CRM Page

Use the Additional Information for CRM page (GM_OPPTY_HDR_CRM) to view CRM-related information for the proposal.

Navigation

Proposal Management, Proposal and Version, Maintain Proposal

Click the Additional Information link on the Maintain Proposal page.

If you created a proposal from PeopleSoft CRM, you can view customer contact information and CRM-related data on this page. To access the order in PeopleSoft CRM, click the link next to the Capture ID field.

Note: The interface to your PeopleSoft Customer Relationship Management database is dependent on a URL identifier that we deliver called CRM_INTERFACE. If you are having trouble accessing your PeopleSoft Customer Relationship Management database, check the entry in the URL field on the URL Maintenance page under the PeopleTools menu navigation structure (select PeopleTools, Utilities, Administration, URLs.)

Copying Proposals, Versions, and Projects

Understanding the Copy Functionality in PeopleSoft Proposal Management

In PeopleSoft Proposal Management, you use the Copy Proposal Process component (GM_BUD_PPSL_CPY) to copy proposals, versions, and projects. Use the:

- Copy Proposal feature to copy versions to use in different proposals.

When you copy a new proposal from an existing proposal version, the system generates the new proposal, version, and project IDs. The system does not select the Create Resources Team check box when you initiate the Copy Proposal feature.

- Copy Version feature to copy versions to use in the same proposal.

When you copy a version, the system generates a new version ID. The system uses the same proposal ID as the proposal version from which you are copying to prevent conflicting data when it generates the proposal into a contract.

- Copy Project feature to copy projects to use in the same version.

When you copy a project, the new proposal ID and version ID match the proposal and version from which you are copying. The system generates the new project ID. Like the Copy Proposal and Copy Version pages, you can select activities and copy options on the Copy Project page. The system uses the same proposal ID as the project from which you are copying to prevent conflicting data when it generates the proposal into a contract.

Copying Proposal Information

This section discusses how to copy proposal information.

Page Used to Copy Proposal Information

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i> | <i>Usage</i> |
|-------------------------|-------------------------------|---|--|
| Copy Proposal | GM_BUD_PPSL_CPY | <ul style="list-style-type: none">• Proposal Management, Proposal Management Center, Copy Proposal• Proposal Management, Proposal and Version, Copy Proposal | Copy proposal information to a new proposal. |

Copy Proposal Page

Use the Copy Proposal page (GM_BUD_PPSL_CPY) to copy proposal information to a new proposal.

Navigation

- Proposal Management, Proposal Management Center, Copy Proposal
- Proposal Management, Proposal and Version, Copy Proposal

Image: Copy Proposal page

This example illustrates the fields and controls on the Copy Proposal page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Copy Proposal' page with the following fields and controls:

- From Proposal:** CON000000000025
- From Version ID:** V101
- From Start Date:** 03/01/2005
- From End Date:** 02/28/2006
- *To Proposal:** NEXT
- *To Version:** NEXT
- To Start Date:** 03/01/2005
- To End Date:** 02/28/2006
- Project:**
 - ☒ From Project ID: 00000000000160 Implementation
 - Find | View All** First 1 of 1 Last
 - To Project ID:** NEXT
- Activity:**
 - Copy** **From Activity** **To Activity** ***Copy Options**
 - ☒ CONSULTATION CONSULTATION Labor and Non-labor
- Copy** button

To Proposal

The word *NEXT* appears by default. When you click Copy, the system generates the next proposal ID that is available.

To Version

The word *NEXT* appears by default. When you click Copy, the system generates *V101* as the version ID.

To Start Date and To End Date

By default, the system populates the start and end dates of the proposal from which you are copying; however, you can change these values. If you change the start and end dates on the target proposal, the copy process changes the start and end dates for all of its projects and activities.

Project

From Project ID

deselect this check box for all the projects that you do not want to copy to the new proposal.

To Project ID

The word *NEXT* appears by default. When you click Copy, the system copies project and activity information to the next available project ID.

Activity**From Activity**

deselect this check box for all the activities that you do not want to copy to the new proposal.

To Activity

The activity ID of the version from which you are copying appears by default. You can, however, select a new activity ID from the list of available choices.

Copy Options

Select a value to specify which information you want to copy to the proposal for the particular activity: *Labor and Non-labor* (system default), *Labor*, *Non-labor*, or *None*.

Copy

Click to initiate the copy process.

Copying Proposal Versions

This section discusses how to copy proposal versions.

Page Used to Copy Proposal Versions

| Page Name | Definition Name | Navigation | Usage |
|------------------|------------------------|--|--|
| Copy Version | GM_BUD_PPSL_CPY | <ul style="list-style-type: none"> Proposal Management, Proposal Management Center, Proposal Management, Maintain Proposal <p>Click the Copy Version button on the Maintain Proposal page.</p> <ul style="list-style-type: none"> Proposal Management, Proposal and Version, Maintain Proposal <p>Click the Copy Version button on the Maintain Proposal page.</p> | Copy version information within the same proposal. |

Copy Version Page

Use the Copy Version page (GM_BUD_PPSL_CPY) to copy version information within the same proposal.

Navigation

- Proposal Management, Proposal Management Center, Proposal Management, Maintain Proposal
Click the Copy Version button on the Maintain Proposal page.
- Proposal Management, Proposal and Version, Maintain Proposal
Click the Copy Version button on the Maintain Proposal page.

Image: Copy Version page

This example illustrates the fields and controls on the Copy Version page. You can find definitions for the fields and controls later on this page.

Copy Version

From Proposal CON0000000000025 *To Proposal CON0000000000025

From Version ID V101 *To Version NEXT

From Start Date 03/01/2005 To Start Date 03/01/2005

From End Date 02/28/2006 To End Date 02/28/2006

Project Find | View All First 1 of 1 Last

☒ From Project ID 00000000000160 Implementation To Project ID 00000000000160

| Copy | From Activity | To Activity | *Copy Options |
|-------------------------------------|---------------|--------------|---------------------|
| <input checked="" type="checkbox"/> | CONSULTATION | CONSULTATION | Labor and Non-labor |

Copy

To Proposal

Displays the current proposal ID from which you are copying the proposal version. You cannot change this field. The new version of the proposal must have the same proposal ID.

To Version

Displays the word *NEXT*. When you click Copy, the system generates the next available version ID for the proposal. For example, if the proposal has versions V101, V102, and V103 and you are copying version V101, the system automatically labels the new version V104.

To Start Date and To End Date

The system populates the start and end dates of the version from which you are copying. You cannot modify these fields.

Project

From Project ID

The system automatically selects all projects when you enter this page. Deselect this check box for all the projects that you do not want to copy to the new version of the proposal.

To Project ID

Displays the ID of the project from which you are copying information. You cannot change the number in this field. The new project ID must always equal the copied project ID, so that there are no conflicting data issues when the proposal is generated into a contract.

Activity

From Activity

Select this check box for all the activities that you want to copy to the new version of the proposal.

To Activity

The activity ID of the version from which you are copying appears by default. You can, however, select a new activity ID from the list of available choices.

Copy Options

Select a value to specify which information you want to copy to the new version for the particular activity: *Labor and Non-labor* (system default), *Labor*, *Non-labor*, or *None*.

Copy

Click to initiate the copy process.

Copying Projects

This section discusses how to copy projects.

Page Used to Copy Projects

| Page Name | Definition Name | Navigation | Usage |
|------------------|------------------------|--|--|
| Copy Project | GM_BUD_PPSL_CPY | <ul style="list-style-type: none"> Proposal Management, Proposal Management Center, Proposal Management, Maintain Proposal <p>Click the Version link on the Maintain Proposal page, and then click the Copy Project link on the Resource Estimate page.</p> <ul style="list-style-type: none"> Proposal Management, Proposal and Version, Maintain Proposal <p>Click the Version link on the Maintain Proposal page, and then click the Copy Project link on the Resource Estimate page.</p> | Copy project information within the same proposal. |

Copy Project Page

Use the Copy Project page (GM_BUD_PPSL_CPY) to copy project information within the same proposal.

Navigation

- Proposal Management, Proposal Management Center, Proposal Management, Maintain Proposal

Click the Version link on the Maintain Proposal page, and then click the Copy Project link on the Resource Estimate page.

- Proposal Management, Proposal and Version, Maintain Proposal

Click the Version link on the Maintain Proposal page, and then click the Copy Project link on the Resource Estimate page.

Image: Copy Project page

This example illustrates the fields and controls on the Copy Project page. You can find definitions for the fields and controls later on this page.

To Proposal

Displays the current proposal ID from which you are copying the project. You cannot change these fields. The new project must have the same proposal ID. To copy information from an entire proposal or a version, use the Copy Proposal page or the Copy Version page.

To Version

Displays the current version ID from which you are copying the project. You cannot change these fields. The new project must have the same version ID.

To Start Date and To End Date

The system populates the start and end dates of the project from which you are copying. You cannot change these fields.

Project

From Project ID

Indicates the value of the source project.

To Project ID

Displays the word *NEXT*. You cannot change the information in this field. When you click Copy, the system generates the next available project ID.

Activity**From Activity**

Select this check box for all the activities that you want to copy to the new project. The system automatically selects all activities when you first access this page.

To Activity

The activity ID of the project from which you are copying appears by default. You can, however, select a new activity ID from the list of available choices.

Copy Options

Select a value to specify which information you want to copy to the new project for the particular activity: *Labor and Non-labor* (system default), *Labor*, *Non-labor*, or *None*.

Copy

Click to initiate the copy process.

Chapter 9

Generating PeopleSoft Proposal Management Reports

Understanding Proposal Reports

PeopleSoft Proposal Management provides three types of reports that summarize proposal information:

- Proposal reports.

Managers use these reports to determine whether to pursue an opportunity.

- Revenue pipeline reports.

Managers use these reports to review the revenue that is expected to be generated by proposals over a period of time.

- Resource demand reports.

Managers use these reports to assess the resources (people) that are needed for upcoming proposals.

Generating Proposal Reports

This section discusses how to generate proposal reports.

Page Used to Generate Proposal Reports

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i> | <i>Usage</i> |
|-------------------------|-------------------------------|---|--|
| Proposal Reports | RUN_GM_PROP_RPT | Proposal Management, Reports, Proposal Reports | Review proposed time and expenses for a particular proposal. |

Proposal Reports Page

Use the Proposal Reports page (RUN_GM_PROP_RPT) to review proposed time and expenses for a particular proposal.

Navigation

Proposal Management, Reports, Proposal Reports

Image: Proposal Reports page

This example illustrates the fields and controls on the Proposal Reports page.

To generate the proposal reports, select a business unit, proposal, and version. Click Run. Click Process Monitor. Select the reports that you want to run from the Process Scheduler Request page and then click OK. You can run these reports from this page:

- Fixed Fee
- Fixed Fee Itemized
- Internal

Generating Pipeline Reports

This section discusses how to generate pipeline reports.

Page Used to Generate Pipeline Reports

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i> | <i>Usage</i> |
|--------------------------|------------------------|---|---|
| Revenue Pipeline Reports | RUN_GM_PL_RPT | Proposal Management, Reports, Revenue Pipeline Report | Review the expected revenue for a particular time period according to specified criteria. |

Revenue Pipeline Reports Page

Use the Revenue Pipeline Reports page (RUN_GM_PL_RPT) to review the expected revenue for a particular time period according to specified criteria.

Navigation

Proposal Management, Reports, Revenue Pipeline Report

Image: Revenue Pipeline Reports page

This example illustrates the fields and controls on the Revenue Pipeline Reports page.

To generate the revenue pipeline reports, select a business unit, proposal status, confidence level, customer, proposal contact, and proposal target due dates. Click Run. Click Process Monitor. Select the reports that you want to run from the Process Scheduler Request page and then click OK. You can run these reports from this page:

- By Confidence Report in Tenths.
- By Confidence Rpt in Quartile.
- By Customer Name Report.
- By Status Report.

Generating Labor Resource Reports

This section discusses how to generate resource reports.

Page Used to Generate Labor Resource Reports

| Page Name | Definition Name | Navigation | Usage |
|------------------------|-----------------|--|--|
| Resource Demand Report | RUN_GM_RES_RPT | Proposal Management, Reports, Resource Demand Report | Analyze the demand on labor resources for future months according to project role. |

Resource Demand Report Page

Use the Resource Demand Report page (RUN_GM_RES_RPT) to analyze the demand on labor resources for future months according to project role.

Navigation

Proposal Management, Reports, Resource Demand Report

Image: Resource Demand Report page

This example illustrates the fields and controls on the Resource Demand Report page.

To generate the resource demand report, select a business unit, proposal status, confidence level, and resource schedule start and end dates. Click Run. Click Process Monitor. Select the labor Resource Demand by Project Role report from the Process Scheduler Request page and then click OK.

Retrieving Proposal Information

This section discusses how to review and retrieve proposal information.

Page Used to Retrieve Proposal Information

| Page Name | Definition Name | Navigation | Usage |
|------------------|-----------------|--|-----------------------------------|
| Proposal Inquiry | GM_PROPOSAL_INQ | Proposal Management, Interactive Reports, Proposal Inquiry | Retrieve proposal information. |

Proposal Inquiry Page

Use the Proposal Inquiry page (GM_PROPOSAL_INQ) to retrieve proposal information.

Navigation

Proposal Management, Interactive Reports, Proposal Inquiry

Image: Proposal Inquiry page

This example illustrates the fields and controls on the Proposal Inquiry page. You can find definitions for the fields and controls later on this page.

Proposal Inquiry

Search Criteria

Business Unit Start Date

Customer ID End Date

Proposal Planner Due Date

Status

Proposal List Personalize | Find | View All | First 1 of 1 Last

| Proposal ID | Proposal | Title | Customer | Proposal Planner | Status |
|--------------------|----------|-----------------------|----------------|------------------|------------|
| 1 CON0000000000025 | | Oracle Implementation | Alliance Group | Miller, William | 01 - Draft |

Select the business unit, customer ID, and status of the proposals that you want to view. Click Retrieve to get a list of proposals that match the criteria that you entered. Click the More Info tab to view begin and end dates for the proposal.



Click the Proposal Link button to access the Maintain Proposal page.

Administering Projects

Understanding How Projects are Used in PeopleSoft Proposal Management

This section discusses:

- Project control.
- Transaction flow control.
- Project analysis.
- Transaction review.
- Analysis inquiries.
- Project data deletion.

Project Control

A project in PeopleSoft Proposal Management represents all or a portion of a proposal. Every proposal in the PeopleSoft Proposal Management system requires a minimum of one project. The proposal project automatic numbering is the same as for PeopleSoft Project Costing, which ensures continuity when the proposal project is generated into a real project.

Note: PeopleSoft Proposal Management enables you to save a proposal without creating a project. However, if you don't add at least one project to the proposal, you cannot run the Generate process or the Pre-Spending process in PeopleSoft Proposal Management and automatically create projects in PeopleSoft Project Costing.

Each project requires a minimum of one activity. Proposals can have multiple projects, and projects can have multiple activities. To enter a transaction line into the Project Resource transaction table (PROJ_RESOURCE) in PeopleSoft Project Costing, a project and activity must exist.

In PeopleSoft Proposal Management, you create projects when you run the Generate, Pre-Spending, or Create Resource processes. In PeopleSoft Project Costing, you can add a project manually through the project definition pages. However, you should only add projects manually after you have run the Generate process. Within PeopleSoft Project Costing you can also attach a project to a contract and a contract line within the Project Definition pages.

Related Links

"Understanding Projects (*PeopleSoft FSCM 9.2: Project Costing*)"

Transaction Flow Control

There are two basic ways to control the flow of data coming into PeopleSoft Project Costing:

1. Set a project or activity to *Inactive* status.

In this case, the project and activity do not appear in the prompt lists of the PeopleSoft feeder systems.

2. Use status control options.

On the Status Types page, select the analysis types that each feeder system uses; then select a project control action to associate with the analysis type.

Note: No project control action occurs if the Project Control Action box is deselected.

Values include:

- *Warning:* Displays a warning before the system accepts the transaction.
- *Reject:* Rejects the transaction.

Instructions on controlling incoming transactions appear in the *PeopleSoft Project Costing*.

Related Links

"Controlling Incoming Transactions (*PeopleSoft FSCM 9.2: Project Costing*)"

Project Analysis

PeopleSoft Project Costing provides several different ways to analyze project data. Before you can analyze project data, you must:

- Create at least one project.
- Create project activities.
- Create transactions that have been assigned resource IDs.

After you establish a project and enter data directly through interfaces with other PeopleSoft applications, you can use the pages in PeopleSoft Project Costing to:

- View a list of all project manager projects.
- Display real-time project information that is pulled from the project summary tables.
- Display all resource transactions for a selected project.

The system automatically populates the lines and analysis types that display in the Project Analysis pages. When you post lines in the Project Budget pages to PeopleSoft Project Costing, the system adds BUD (budget) lines to the Project Analysis pages. After you run the Integrate Enterprise Data processes, you can use the Project Analysis pages to make inquiries on the data that originated from PeopleSoft General Ledger, PeopleSoft Inventory, PeopleSoft Payables, PeopleSoft Purchasing, and PeopleSoft Time and Labor.

Instructions on analyzing project data appear in the *PeopleSoft Project Costing*.

Transaction Review

PeopleSoft Project Costing provides a series of pages that enable you to review costs for a project and an activity based on different integration criteria. From these pages, you can navigate back to the related PeopleSoft application and view transactions in greater detail.

Instructions on reviewing project costs and transactions appear in the *PeopleSoft Project Costing*.

Related Links

"Viewing Transactions in Progress (*PeopleSoft FSCM 9.2: Project Costing*)"

Analysis Inquiries

PeopleSoft Project Costing provides a series of pages that you can use for online project analysis—to view a financial or resource summary of a project, the projected costs to complete a project, under and over budget resources, and budget to actual variances.

Instructions on performing online project analysis appear in the *PeopleSoft Project Costing*.

Related Links

"Analyzing Projects Using Analysis Inquiries (*PeopleSoft FSCM 9.2: Project Costing*)"

Chapter 11

Integrating with PeopleSoft Billing

Understanding the Billing Process

This section discusses:

- System preparation.
- Process overview.
- The Contracts/Billing Interface process.
- The billing interface process.
- PeopleSoft Billing worksheet approval.
- PeopleSoft Billing worksheet deletion.
- The Finalization process.
- The Projects/Contracts Interface process.
- Deferred revenue accounting.

System Preparation

PeopleSoft Proposal Management integrates with PeopleSoft Contracts, PeopleSoft Project Costing, and PeopleSoft General Ledger to enable bill processing. Before you can perform the billing activities associated with expenditures, you need to set up the billing control tables used by the various applications.

PeopleSoft applications rely on tables to store not only business transactions, but also the structure and processing rules that drive the system. Before you can run the processes to generate invoices, you need to establish the structure that tells the system how you want those processes to work.

Before you run the billing processes or manage billing for your awards, you must prepare your PeopleSoft system accordingly.

Make sure you complete these steps before you initiate the billing processes:

| Step | Navigation |
|--|---|
| Set installation options for PeopleSoft Billing. | Select Set Up Financials/Supply Chain, Install, Installation Options, Billing Integration Options. |
| Define a PeopleSoft Billing business unit. | Select Set Up Financials/Supply Chain, Business Unit Related, Billing, Billing Definition, Business Unit 1. |

| Step | Navigation |
|---|---|
| Define a distribution code for unbilled accounts receivable. | Select Set Up Financials/Supply Chain, Common Definitions, Distribution Accounting, Distribution Code. |
| Create a proposal and generate the contract. | Select Proposal Management, Proposal and Version, Maintain Proposal. Click the Generate button on the Maintain Proposal page. |
| Change the status on the contract to <i>Active</i> . | Select Customer Contracts, Create and Amend, General Information, General. |
| Change the status on the billing plan to <i>Ready</i> . | Select Customer Contracts, Create and Amend, General Information, General. Click the Billing Plans link. Then click the Plan ID link. |
| Create billable rows in PeopleSoft Project Costing (use either method): <ul style="list-style-type: none"> Populate the Project Resource table (PROJ_RESOURCE) through the Project Integration process. Add transactions directly into PeopleSoft Project Costing. | Select Project Costing, Cost Collection. Then select the feeder system from which you want to retrieve information. OR Select Project Costing, Transaction Definitions, Add Transactions. |
| Note: The methods for creating billable rows described are for rate-based billing only. | |

Process Overview

For rate-based billing in PeopleSoft Proposal Management, the Contracts/Billing Interface process (CA_BI_INTFC) selects resource rows from PeopleSoft Project Costing. You can select contract lines in PeopleSoft Contracts with ready bill plans to create bill lines in the Billing Interface (INTFC_BI and its related tables). After the Contracts/Billing Interface process stages billing data in these tables, the billing interface processes the data to create bills.

The billing interface can create two types of bills:

- Temporary bills

These bills are routed to the billing worksheet, where your billing administrator can review and, for rate-based bills, amend them as needed before real bills are created. You cannot amend fixed-amount bills in the billing worksheet.

- Real bills

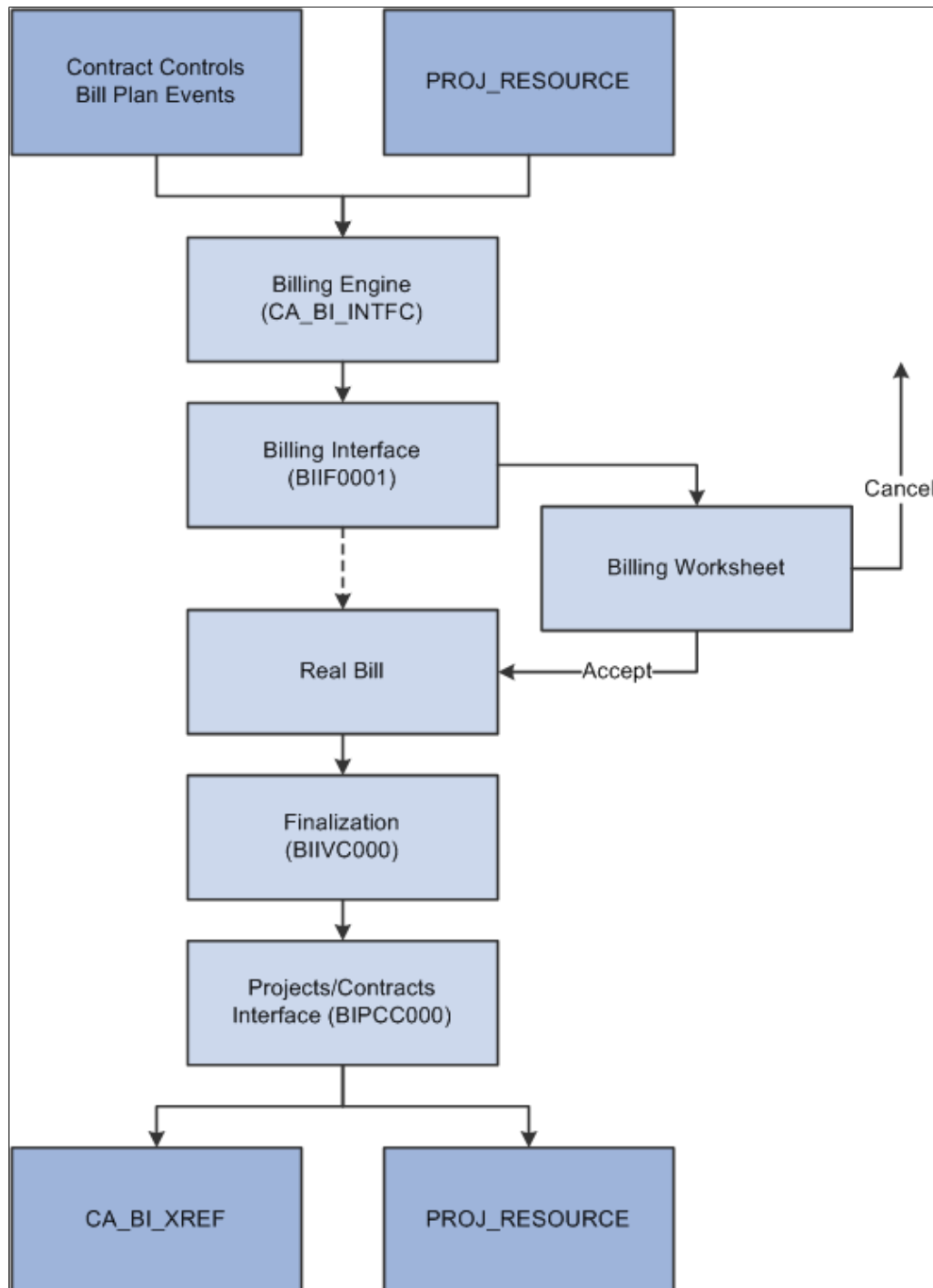
These bills become invoices that are sent to the customer. You select the option to create temporary or real bills for individual billing plans on the Billing Plan - Billing Plan General page in PeopleSoft Contracts.

You can use the billing worksheet to cancel temporary bills. When you cancel a temporary bill from within the billing worksheet, the system updates PeopleSoft Project Costing and PeopleSoft Contracts accordingly.

After you review a temporary bill on the billing worksheet, you can create a real bill. The system creates a real bill after a user approves it and saves the worksheet. When the bill is finalized, the system updates the Project Resource table (PROJ_RESOURCE) and the Contracts/Billing Interface Xref table (CA_BP_XREF).

Image: Billing Interface process

This flowchart illustrates the Billing Interface process (BIIF0001) Transactions are passed from Contracts and Project Costing by the CA_BI_INTFC process to Billing, where the invoices or letter of credit amounts are finalized. The billed data is then passed back to Contracts and Project Costing updating the CA_BI_XREF and PROJ_RESOURCE tables, respectively.



Updates in PeopleSoft Project Costing and PeopleSoft Contracts are made throughout the billing cycle for rate-based and fixed-fee billing plans.

"Understanding PeopleSoft Billing Integration with Contracts, Project Costing, Grants, and Pay/Bill Management (*PeopleSoft FSCM 9.2: Billing*)"

The Contracts/Billing Interface Process

Run the Contracts/Billing Interface process in PeopleSoft Contracts to send billing activity in Projects to PeopleSoft Billing. The contracts that you set up control the billing activity that the system selects from PeopleSoft Project Costing.

Instructions about running the Contracts/Billing Interface process are in the *PeopleSoft Contracts*.

Related Links

"Understanding the Contracts Billing Process (*PeopleSoft FSCM 9.2: Contracts*)"

The Billing Interface Process

Run the Billing Interface process in PeopleSoft Billing to create the temporary bills that you can work on in the billing worksheet. The billing worksheet is a temporary work area in which you can review and adjust billing lines from the Billing Interface process before you create actual bills.

After making adjustments, use the Billing Worksheet component to approve or delete temporary bills.

Instructions about running the Billing Interface process are in the *PeopleSoft Billing*.

Related Links

"Understanding the Billing Interface Process (BIIF0001) (*PeopleSoft FSCM 9.2: Billing*)"

"Correcting Billing Interface Errors (*PeopleSoft FSCM 9.2: Billing*)"

"Understanding PeopleSoft Billing Integration with Contracts, Project Costing, Grants, and Pay/Bill Management (*PeopleSoft FSCM 9.2: Billing*)"

Billing Worksheet Approval

When you accept a bill in the billing worksheet, the system creates a real bill with a real invoice number, and updates PeopleSoft Contracts and PeopleSoft Project Costing accordingly.

Instructions about approving billing worksheets are in the *PeopleSoft Billing*.

Related Links

"Processing Billing Worksheets (*PeopleSoft FSCM 9.2: Billing*)"

Billing Worksheet Deletion

When you delete a bill in the billing worksheet, the system cancels the bill and updates PeopleSoft Contracts and PeopleSoft Project Costing accordingly.

Instructions about deleting billing worksheets are in the *PeopleSoft Billing*.

Related Links

"Processing Billing Worksheets (*PeopleSoft FSCM 9.2: Billing*)"

The Finalization Process

Run the Finalization process (BIIVC000) on the real bills that you create. This process performs a variety of tasks, including calculating taxes and the due date.

Instructions about running the Finalization process are in the *PeopleSoft Billing*.

Related Links

"Running the Pro Forma, Finalization, Print, and Reprint Processes (*PeopleSoft FSCM 9.2: Billing*)"

The Projects/Contracts Interface Process

After you run the Finalization process, run the Billing to Projects/Contracts Interface process (BIPCC000). This process updates PeopleSoft Contracts and PeopleSoft Project Costing with the finalized bill information from PeopleSoft Billing.

Instructions about running the Projects/Contracts Interface process are in the *PeopleSoft Billing*.

Related Links

"Running the Billing to Project Costing/Contracts Interface Process (BIPCC000) (*PeopleSoft FSCM 9.2: Billing*)"

Deferred Revenue Accounting

In some cases, you may want to create and send invoices for products or services that you will deliver in the future or over a range of time. You can use deferred revenue accounting to generate accounting entries that defer revenue recognition based on a revenue recognition date and method of your choosing.

You can establish date range deferred revenue calculation method defaults at the system, business unit, or bill type level, according to your business needs. PeopleSoft Billing supports five calculation methods for creating accounting entries for deferred revenue of transactions when the recognition basis is a date range:

- Spread by days within range.
- Spread evenly across all periods.
- Spread evenly using a mid-period rule.
- Spread partial periods by days with remainder spread evenly.
- User-defined proration.

Related Links

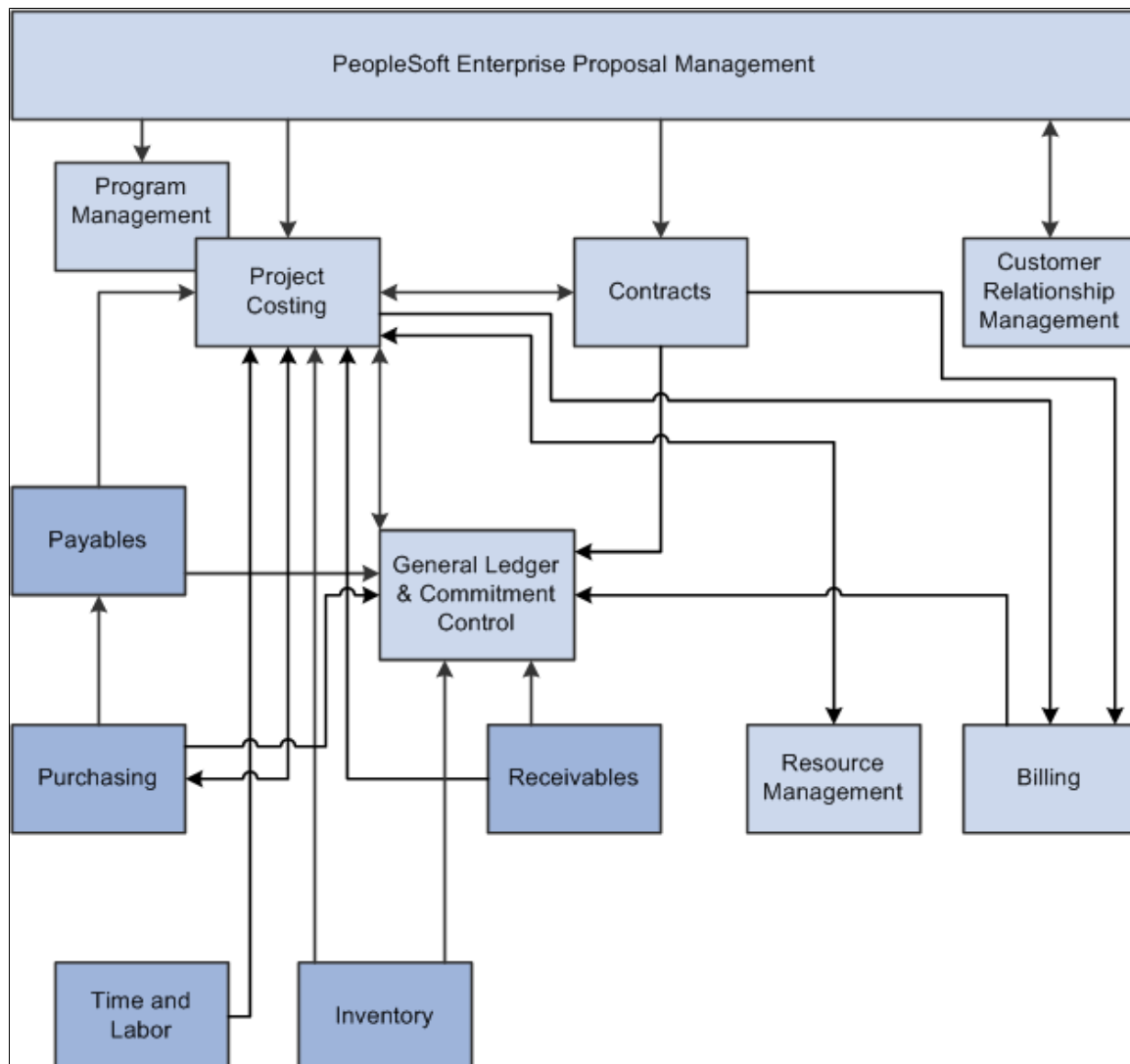
"Understanding the Deferred Revenue Accounting Process (*PeopleSoft FSCM 9.2: Billing*)"

Integrating with Other PeopleSoft Applications

Understanding Integration Process Flows

Image: Proposal Management integration with other PeopleSoft applications

This diagram shows the integration touch points between PeopleSoft Proposal Management and PeopleSoft Program Management, Project Costing, Contracts, Customer Relationship Management, Payables, General Ledger, Purchasing, Receivables, Resource Management, Billing, Time and Labor, and Inventory.

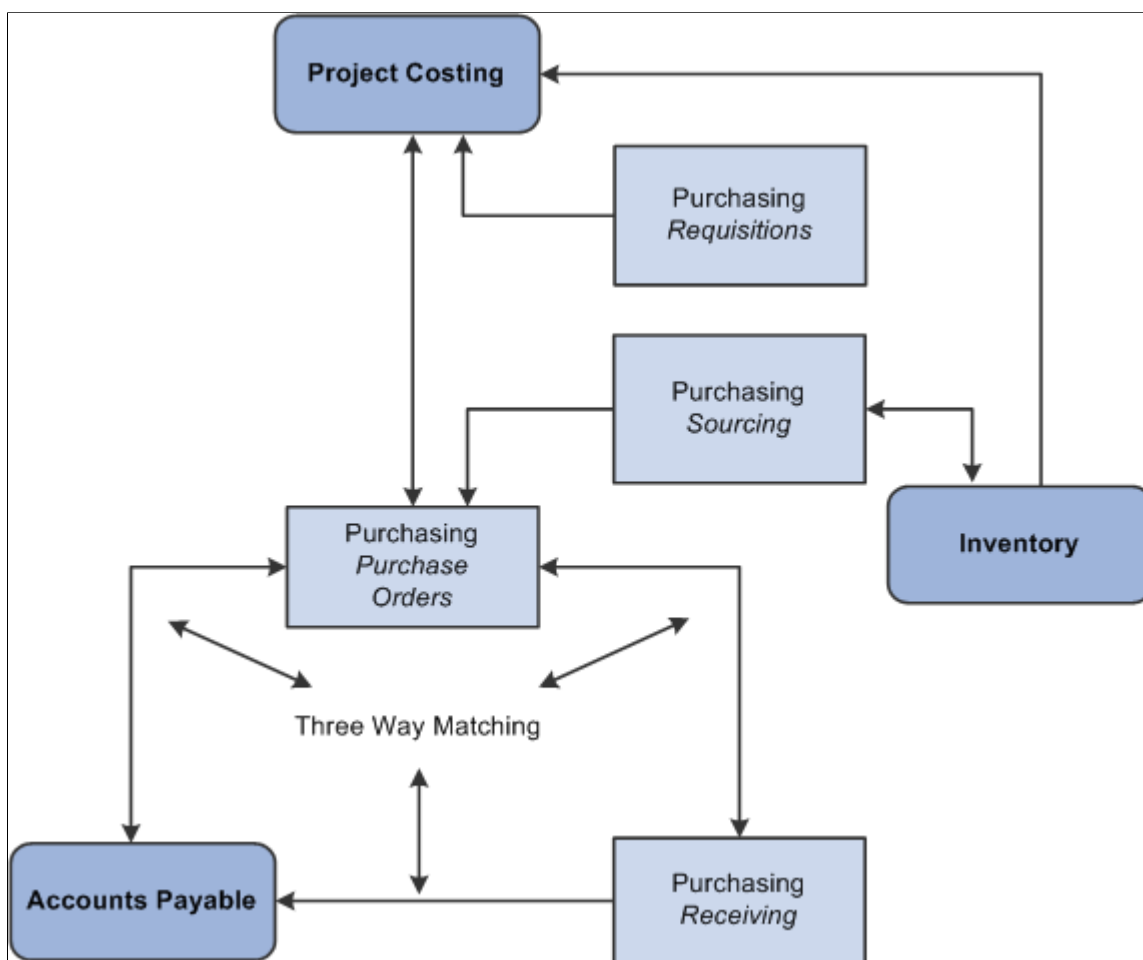


Understanding the Procurement Process

You can enter requisitions into PeopleSoft Purchasing, and then pull them into PeopleSoft Project Costing for tracking purposes.

Image: The procurement process

This diagram shows the procurement process flow associated with requisitions when PeopleSoft Project Costing is integrated with PeopleSoft Purchasing, PeopleSoft Payables, and PeopleSoft Inventory.



Integrating with PeopleSoft Customer Relationship Management

Customers using PeopleSoft CRM Sales and Collaborative Selling can initiate service-based proposals from within PeopleSoft CRM through an interface with PeopleSoft Proposal Management. For opportunities requiring manual entry, you can create and price multiple service-based proposals. You can build each proposal using resource inputs at the project activity level.

The following sections describe the integration points:

Proposal Integration

Proposal Integration consists of two application messages: OC_ESA_PROPOSAL and OC_ESA_PROPOSAL_RESPONSE. When an order or quote is submitted for a service type engagement in PeopleSoft CRM, the system sends the proposal request message (OC_ESA_PROPOSAL) to PeopleSoft Proposal Management.

In response to this message, PeopleSoft Proposal Management sends a message (OC_ESA_PROPOSAL_RESPONSE) to PeopleSoft CRM to return the Capture ID, Proposal ID, and Version ID.

The system sends these fields from PeopleSoft CRM to PeopleSoft Proposal Management:

| Source = CRM | Target = PeopleSoft Proposal Management | | |
|---|--|-----------------|--------------------|
| Record | Field | Record | Field |
| RO_HEADER | CAPTURE_ID | GM_PROPOSAL | CAPTURE_ID |
| BUS_UNIT_TBL_RO | BUSINESS_UNIT_ESA | GM_PROPOSAL | BUSINESS_UNIT |
| RO_LINE | PRODUCT_ID | GM_PROPOSAL | PRODUCT_ID |
| PROD_ITEM | DESCR | GM_PROPOSAL | PRODUCT_DESCR |
| RO_LINE | PRICE | GM_PROPOSAL | PRICE |
| RO_LINE | CURRENCY_CD | GM_PROPOSAL | CURRENCY_CD |
| RO_NOTE | DESCRLONG | GM_PROP_COMMENT | DESCRLONG |
| RB_INT_CUST_ADS | CUST_ID | GM_PROPOSAL | CUST_ID |
| RSF_OPPORTUNITY or RSF_LEAD | SALES_USER_NAME | GM_PROPOSAL | SALESREP_NAME |
| Note: System uses either record depending on if the quote has a lead or an opportunity attached. | | | |
| Note: System uses PeopleCode to retrieve phone and extension information. Not a direct read of a record. | CC_PHONE_EXTENSION | GM_PROPOSAL | CC_PHONE_EXTENSION |

| Source = CRM | Target = PeopleSoft Proposal Management | | |
|---|--|-------------|----------------|
| Note: System uses PeopleCode to retrieve email address information. Not a direct read of a record. | EMAIL_ADDR | GM_PROPOSAL | EMAIL_ADDR |
| RO_ASSOCIATION | PROPOSAL_ID | GM_PROPOSAL | PROPOSAL_ID |
| RO_ASSOCIATION | VERSION_ID | GM_PROPOSAL | VERSION_ID |
| RO_HEADER | QUOTE_EXPIRE_DT | GM_PROPOSAL | DUE_DATE |
| RO_HEADER | DESCR50 | GM_PROPOSAL | PROPOSAL_TITLE |
| RO_HEADER | CAPTURE_DATE | GM_PROPOSAL | BEGIN_DT |
| RO_HEADER | QUOTE_DUE_DATE | GM_PROPOSAL | END_DT |

In response to the first message, the system sends these fields from PeopleSoft Proposal Management to PeopleSoft CRM:

| Source = PeopleSoft Proposal Management | Target = CRM | | |
|--|---------------------|----------------|----------------|
| Record | Field | Record | Field |
| ESA_OC_RSPN | PROPOSAL_ID | RO_ASSOCIATION | PROPOSAL_ID |
| ESA_OC_RSPN | VERSION_ID | RO_ASSOCIATION | VERSION_ID |
| ESA_OC_RSPN | CAPTURE_ID | RO_ASSOCIATION | CAPTURE_ID |
| ESA_OC_RSPN | BUSINESS_UNIT | RO_ASSOCIATION | ASSOC_BUS_UNIT |
| ESA_OC_RSPN | MESSAGE_TEXT | NA | NA |

Note: The system uses the MESSAGE_TEXT field to log error messages if any errors occur when the proposal is being created or updated.

PeopleSoft Proposal Management uses the customer number to query the customer table for customer name and current contact information. When PeopleSoft Proposal Management receives the message, the following occurs:

- If the proposal ID is blank, the system creates a new proposal.
- If the proposal ID is not blank, the system updates the existing proposal.
- If a quote in PeopleSoft CRM has expired, it may be revised in CRM.

This creates a new quote with a new capture ID. The system then passes the proposal ID to PeopleSoft Proposal Management from the original quote. PeopleSoft Proposal Management checks if the proposal has been closed out (proposal status equals *Canceled*). If it has been closed, the system reopens the proposal for pricing (proposal status is updated to *Draft*).

Quote Integration

When pricing information is completed in PeopleSoft Proposal Management, the Quote Integration application message (ESA_PROPOSAL_PRICE) sends pricing information back to PeopleSoft CRM. This occurs when a user clicks the Set To Ready button on the Maintain Proposal page in PeopleSoft Proposal Management. After the system sends the message to PeopleSoft CRM, the selected proposal version is locked and uneditable.

The system sends these fields from PeopleSoft Proposal Management to PeopleSoft CRM:

| Source = PeopleSoft Proposal Management | Target = CRM | | |
|--|---------------------|----------------|---------------|
| Record | Field | Record | Field |
| GM_PROPOSAL | PROPOSAL_ID | RO_ASSOCIATION | PROPOSAL_ID |
| GM_PROPOSAL | VERSION_ID | RO_ASSOCIATION | VERSION_ID |
| GM_PROPOSAL | BUSINESS_UNIT | RO_HEADER | BUSINESS_UNIT |
| GM_PROPOSAL | TOTAL_BUDGET_AMT | RO_LINE | PRICE |
| GM_PROP_COMMENT | DESCRLONG | RO_NOTE | DESCRLONG |

Note: PeopleSoft Proposal Management sends note descriptions to PeopleSoft CRM, but PeopleSoft CRM does not update them.

Sales Integration

The system triggers the Sales Integration application message (OC_ESA_PROPOSAL_STATUS) from PeopleSoft CRM when a sales lead or opportunity is lost or sold, when the direct quote or order is sold, when the quote or order line is canceled (quotes expire after a specified time interval), or when the order line needs to be repriced.

When PeopleSoft Proposal Management receives the message, it updates the corresponding proposal version with either the *Draft*, *Denied*, or *Committed* status, which is based on the contents of the message. The system sends these fields from PeopleSoft CRM to PeopleSoft Proposal Management:

| Source = CRM | Target = PeopleSoft Proposal Management | | |
|---------------------|--|-------------|-------------|
| Record | Field | Record | Field |
| RO_ASSOCIATION | PROPOSAL_ID | GM_PROPOSAL | PROPOSAL_ID |

| Source = CRM | Target = PeopleSoft Proposal Management | | |
|---------------------|--|-----------------|---------------|
| RO_ASSOCIATION | VERSION_ID | GM_PROPOSAL | VERSION_ID |
| RO_ESA_BU | BUSINESS_UNIT_ESA | GM_PROPOSAL | BUSINESS_UNIT |
| RO_HEADER | CAPTURE_ID | GM_PROPOSAL | CAPTURE_ID |
| RO_LINE.STATUS | STATUS_CODE | GM_PROPOSAL | SUBMIT_STATUS |
| RO_NOTE | DESCRLONG | GM_PROP_COMMENT | DESCRLONG |

When PeopleSoft Proposal Management receives the message, the following occurs:

- If the order capture line status is *Lost*, the system updates the proposal status to *Denied*.
- If the order capture line status is *Sold*, the system updates the proposal status to *Committed*.
- If the order is expired, the system updates the proposal status to *Canceled*.
- If the order capture line status is *Negotiate*, the system updates the proposal status to *Draft* and enables re-pricing for the related proposal version.

Statuses

This table shows how statuses from both PeopleSoft Proposal Management and PeopleSoft CRM correspond to each other:

| PeopleSoft Proposal Management Status | PeopleSoft CRM Status |
|--|------------------------------|
| Draft | Draft |
| Ready | Priced |
| Draft | Negotiate |
| Denied | Lost |
| Committed | Sold |
| Canceled | Expired |

Installation

To activate integration between PeopleSoft CRM and PeopleSoft Proposal Management, you must activate these messages at the message level:

- OC_ESA_PROPOSAL
- OC_ESA_PROPOSAL_RESPONSE

- ESA_PROPOSAL_PRICE
- OC_ESA_PROPOSAL_STATUS

See the product documentation for *PeopleTools: PeopleSoft Integration Broker*

Integrating with PeopleSoft Contracts, PeopleSoft Project Costing, and PeopleSoft Program Management

Through the Generate process, PeopleSoft Proposal Management writes data to PeopleSoft Contracts, PeopleSoft Project Costing, and PeopleSoft Program Management.

The system writes data to these Contract tables during the Proposal Management Generate process:

- CA_CONTR_HDR
- CA_BILL_PLAN
- CA_ACCTPLAN
- CA_DETAIL
- CA_DTL_DST_DATE
- CA_DETAIL_DST
- CA_DETAIL_UAR
- CA_DETAIL_DFR
- CA_RATE
- CA_DETAIL_PROJ

The system writes data to these PeopleSoft Project Costing and PeopleSoft Program Management tables during the Proposal Management Generate process:

- PROJECT
- PROJ_ACTIVITY
- PC_BUD_ITEM
- PC_RATE
- PC_RATE_DTL
- PC_RATE_DTL_LN
- PROJECT_TEAM
- PROJ_TEAM_SCHED
- PROJ_ACT_TEAM

- PC_TEAM_IP_SCHD
- PC_BUD_PLAN
- PC_BUD_DETAIL

PeopleSoft Project Costing integrates with both PeopleSoft Billing and PeopleSoft Contracts, so any adjustments, discounts, released retainages, or limits created for project-related bills are inherited from corresponding bills and contracts.

PeopleSoft Proposal Management writes general project information, project activity information, and budget information directly into PeopleSoft Project Costing.

Note: Your organization may customize additional validation checks and required fields based on your internal project approval requirements. You may also decide to build interfaces that populate or update project records and customer internet sites, EDI transaction sets, and data warehouses, since web sites and EDI transaction sets often incorporate data elements that are included in the PeopleSoft Project Costing pages.

Related Links

"Establishing Project Profiles (*PeopleSoft FSCM 9.2: Grants*)"

"Establishing Project Activities (*PeopleSoft FSCM 9.2: Grants*)"

Integrating with PeopleSoft Time and Labor

Using tables, enterprise integration points, and other processes delivered with PeopleSoft Project Costing and PeopleSoft Time and Labor, the system brings labor costs into PeopleSoft Project Costing anytime PeopleSoft Project Costing needs estimates for billing.

To enable data transfer from PeopleSoft Time and Labor to PeopleSoft Project Costing during a payroll period, PeopleSoft Time and Labor uses an estimation process linked with North American Payroll to summarize hours and labor expenses. These estimates are brought into PeopleSoft Project Costing as transactions with an analysis type of TLA (Time and Labor Accruals). To facilitate billing from estimates, Time and Labor for Billing (TLB) rows are created during estimate processing. The monetary amounts of these estimates are close to what the eventual *pro rata* amounts will be after the payroll close, but are subject to change.

It is important to remember when setting up integration between PeopleSoft Project Costing and PeopleSoft Time and Labor that you are working in two separate databases: Financials and HCM. Therefore, information must be present in both databases before you can begin.

There are six project prompt tables (along with the Project Team and Project Status tables) in PeopleSoft Time and Labor that are populated by integration with PeopleSoft Project Costing.

Note: The prompt tables are synchronized between PeopleSoft Financials and HCM using application messaging. Refer to the enterprise integration documentation for more information.

Related Links

"Understanding Integration with PeopleSoft Time and Labor (*PeopleSoft FSCM 9.2: Project Costing*)"

Integrating with PeopleSoft General Ledger

PeopleSoft Project Costing has a built-in integration with PeopleSoft General Ledger through the Journal Generator for both single-sided transactions and double-sided transactions.

Single-Sided Transactions

After you create accounting entry templates to generate double-sided entries, run the Process Accounting process. The Process Accounting process uses the accounting entry templates to generate double-sided entries and writes them to the CA_ACCTG_LN_PC table.

You then distribute the transactions to PeopleSoft General Ledger. Run the Journal Generator using the PC_COSTS run control with the PCDEFN accounting entry definition specified. This distributes the transactions to the Journal Header Data (JRNL_HEADER) and Journal Line Data (JRNL_LN) tables in PeopleSoft General Ledger.

Double-Sided Transactions

Accounting entry templates are not necessary for distributing double-sided transactions. To distribute double-sided transactions created through the Resource Adjustments page in PeopleSoft Project Costing, run the Journal Generator using the PC_ADJUST run control with the PCDEFN accounting entry definition specified. This distributes the transactions to the Journal Header Data and Journal Line Data tables in PeopleSoft General Ledger.

You can then retrieve posted journals back to PeopleSoft Project Costing with the PeopleSoft General Ledger to Projects Interface process (PC_GL_TO_PC).

Related Links

"Understanding Integration with PeopleSoft General Ledger (*PeopleSoft FSCM 9.2: Project Costing*)"

Integrating with PeopleSoft Commitment Control

PeopleSoft Commitment Control is an optional feature of Oracle's PeopleSoft Financial Management (FMS), Oracle's PeopleSoft Enterprise Service Automation (ESA), and Oracle's PeopleSoft customer Relationship Management (SCM) product lines that enables you to control expenditures actively against predefined, authorized budgets. In particular, PeopleSoft Commitment Control enables you to:

- Create and maintain control budgets.
- Check actual transactions (such as actual expenditures and revenues) against control budgets.
- Check imminent future financial obligations (pre-encumbrances and encumbrances) against control budgets.
- Check recognized revenue against revenue estimate budgets.

When you set up your control budgets, you associate them with a particular PeopleSoft General Ledger business unit and designate amounts for them. You also define which kinds of transactions you will check against your control budgets. After your budgets are established, you check all of these transactions

against your budgets, passing or failing the transactions, depending on the remaining available budget amount and the degree of budgetary control you set up for your budgets.

Related Links

"Integration of Commitment Control with Third-Party Applications (*PeopleSoft FSCM 9.2: Commitment Control*)"

Integrating with PeopleSoft Receivables

The integration of PeopleSoft Receivables with PeopleSoft Project Costing provides project managers with accounts receivable items and revenue related adjustments. As a result, project managers have information about the progress of a project in terms of the outstanding revenue.

The Receivables to Projects process (PC_AR_TO_PC) moves data from PeopleSoft Receivables to PeopleSoft Project Costing. The system identifies entry type and system functions for revenue related adjustments in AR and only those rows are moved to the Project Resource table.

Related Links

"Understanding Integration with PeopleSoft Receivables (*PeopleSoft FSCM 9.2: Project Costing*)"

Integrating with PeopleSoft Purchasing

Data flows both ways between PeopleSoft Project Costing and PeopleSoft Purchasing. You can enter requisition lines directly into PeopleSoft Project Costing, retrieve them with the Purchasing Requisition Loader, and then process them as requisitions in PeopleSoft Purchasing. Requisitions entered through another means into PeopleSoft Purchasing can be brought into PeopleSoft Project Costing as requisition lines. You can also pull transactions representing materials for which purchase orders have been created into PeopleSoft Project Costing as committed costs.

Use the Purchasing to Projects process (PC_PO_TO_PC) to pull requisitions or purchase orders into PeopleSoft Project Costing.

Related Links

"Understanding Procurement Costs (*PeopleSoft FSCM 9.2: Project Costing*)"

Integrating with PeopleSoft Inventory

After you identify an item on a requisition as an inventory item by the PeopleSoft sourcing routine, you can check purchasing availability directly from PeopleSoft Purchasing or create a demand and place it on the Inventory Demand Interface table (DEMAND_INF_INV), where PeopleSoft Inventory picks it up.

PeopleSoft Inventory then determines whether the demand can be fulfilled. If it cannot be fulfilled, it is sent back to PeopleSoft Purchasing and a purchase order is generated or the demand is back ordered. If the demand can be fulfilled, the requested items are assigned to the Project ID identified on the demand. The fulfilled demand is then placed via Inventory Costing on the Invoice Accounting Distribution table

(CM_ACCTG_LINE), where it is picked up by PeopleSoft Project Costing and brought in as a resource transaction with an analysis type of ACT.

Use the Inventory Process Request page to pull fulfilled demands into PeopleSoft Project Costing from PeopleSoft Inventory.

Related Links

"Integrating with PeopleSoft Inventory (*PeopleSoft FSCM 9.2: Project Costing*)"

Integrating with PeopleSoft Payables

After you create a purchase order in PeopleSoft Purchasing, the system sends it to PeopleSoft Payables. When you enter vouchers into PeopleSoft Payables for bills received, they go through a matching process. After the system matches a voucher, it also approves and posts it to the Accounts Payable Accounting Entries table (VCHR_ACCTG_LINE). From this table, you can pull vouchers that carry a PC distribution status of *N* into PeopleSoft Project Costing. The analysis type ACT appears by default.

Use the Payables Process Request page to run the Accounts Payable to Projects Interface process (PC_AP_TO_PC), and pull approved vouchers into PeopleSoft Project Costing from PeopleSoft Payables.

Related Links

"Integrating with PeopleSoft Payables (*PeopleSoft FSCM 9.2: Project Costing*)"

Integrating with Third-Party Systems

PeopleSoft Project Costing integrates with third-party systems by giving you the ability to pull data elements from those systems into corresponding fields and tables in PeopleSoft Project Costing. The requirements include the ability to export the information from the third-party systems into a database table or a flat file, and then import that information into the PeopleSoft Project Costing interface tables.

Appendix A

PeopleSoft Proposal Management Reports

PeopleSoft Proposal Management Reports: A to Z

This table lists all of the reports provided with PeopleSoft Proposal Management, sorted alphanumerically by report ID.

Note: For samples of these reports, see the Portable Document Format (PDF) files that are published with your online documentation.

PeopleSoft Proposal Management Proposal Reports

| Report ID and Report Name | Description | Navigation | Run Control Page |
|---|--|--|-------------------------|
| PM1100 Fixed Fee | Review proposed resource for a particular proposal. | Proposal Management, Reports, Proposal Reports | RUN_GM_PROP_RPT |
| PM1110 Fixed Fee Itemized (BI Publisher) | Review proposed resource for a particular proposal, including adjustments. | Proposal Management, Reports, Proposal Reports | RUN_GM_PROP_RPT |
| PM1120 Internal | Review proposed resource for a particular proposal, including bill, cost and margin rates. | Proposal Management, Reports, Proposal Reports | RUN_GM_PROP_RPT |

PeopleSoft Proposal Management Resource Demand Report

| Report ID and Report Name | Description | Navigation | Run Control Page |
|--|---|--|-------------------------|
| PM1310 Resource Demand by Role Report | Analyze the demand on resources for future months according to project role and specified criteria. | Proposal Management, Reports, Resource Demand Report | RUN_GM_RES_RPT |

PeopleSoft Proposal Management Revenue Pipeline Reports

| Report ID and Report Name | Description | Navigation | Run Control Page |
|--|--|---|-------------------------|
| PM1200 By Confidence Report in Tenths | Review the expected revenue for a particular time period. The report lists, by tenths, the proposals that fall into the confidence range that you specify. | Proposal Management, Reports, Revenue Pipeline Report | RUN_GM_PL_RPT |
| PM1210 By Confidence Rpt in Quartile | Review the expected revenue for a particular time period. The report lists, by quarters, the proposals that fall into the confidence range that you specify. | Proposal Management, Reports, Revenue Pipeline Report | RUN_GM_PL_RPT |
| PM1410 By Status Report | Review the expected revenue for a particular time period by status according to specified criteria. | Proposal Management, Reports, Revenue Pipeline Report | RUN_GM_PL_RPT |
| PM1400 By Customer Name Report | Review the expected revenue for a particular time period by customer name according to specified criteria. | Proposal Management, Reports, Revenue Pipeline Report | RUN_GM_PL_RPT |