## Oracle® Proposals

Implementation Guide

Release 11*i*

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Oracle Proposals Implementation Guide, Release 11*i*

Part No.  B10289-01

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**Oracle Proposals Implementation Guide, Release 11*i***

**Part No. B10289-01**

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# Preface

## Intended Audience

Welcome to Release 11*i* of the Oracle Proposals Implementation Guide.

This guide assumes you have a working knowledge of the following:

- The principles and customary practices of your business area.

- Oracle Proposals

  If you have never used Oracle Proposals, Oracle suggests you attend one or more of the Oracle Proposals training classes available through Oracle University.

- The Oracle Applications graphical user interface.

  To learn more about the Oracle Applications graphical user interface, read the *Oracle Applications User's Guide*.

See Other Information Sources for more information about Oracle Applications product information.

## How To Use This Guide

This document contains the information you need to understand and use Oracle Proposals.

- Chapter 1 provides an overview of Oracle Proposals, and describes its features.

- Chapter 2 provides an overview of what you need to have installed, implemented, and verified before implementing Oracle Proposals.

- Chapter 3 lists the steps needed for implementing Oracle Proposals.

- Chapter 4 lists the tasks for implementing Oracle Proposals.

- Chapter 5 contains material useful in verifying the implementation.

- Chapter 6 explains Oracle Proposals integration with other Oracle products and third party integrations.

- In addition, the following appendixes are included in this guide:

  - Appendix A, Oracle Proposals Profile Options

  - Appendix B, User Data

## Typographic Conventions

The following table lists the typographic conventions used in this manual:

| Convention | Meaning |
|---|---|
| *italic text* | Book titles |
| Courier text | User commands and file content examples |
| UPPERCASE | Structured Query Language (SQL) commands, initialization parameters, profile options, responsibilities, or environment variables |
| **boldface text** | Menu, button, keyboard, and form options |
| | Emphasized words or phrases |
| < > | Angle brackets enclose user-supplied names. |
| | Note: Do not type the angle brackets. |

## Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible, with good usability, to the disabled community. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Standards will continue to evolve over time, and Oracle Corporation is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For additional information, visit the Oracle Accessibility Program Web site at
http://www.oracle.com/accessibility/.

**Accessibility of Code Examples in Documentation**   JAWS, a Windows screen reader, may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, JAWS may not always read a line of text that consists solely of a bracket or brace.

**Accessibility of Links to External Web Sites in Documentation**   This documentation may contain links to Web sites of other companies or organizations that Oracle Corporation does not own or control. Oracle Corporation neither evaluates nor makes any recommendations regarding the accessibility of these Web sites.

# Other Information Sources

You can choose from many sources of information, including online documentation, training, and support services, to increase your knowledge and understanding of Oracle Proposals.

If this guide refers you to other Oracle Applications documentation, use only the Release 11*i* versions of those guides.

### Online Documentation

All Oracle Applications documentation is available online (HTML or PDF). Online help patches are available on MetaLink.

### Related Documentation

Oracle Proposals shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other product documentation when you set up and use Oracle Proposals.

You can read the documents online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD included in your media pack, or by using a Web browser with a URL that your system administrator provides.

If you require printed guides, you can purchase them from the Oracle Store at http://oraclestore.oracle.com.

## Documents Related to All Products

### Oracle Applications User's Guide

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI) available with this release of Oracle Proposals(and any other Oracle Applications products). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes.

You can access this user's guide online by choosing "Getting Started with Oracle Applications" from any Oracle Applications help file.

## Documents Related to This Product

### Oracle Proposals User Guide

This guide describes and explains the concepts and procedures that are helpful in using the application.

### Oracle Quoting Implementation Guide

This guide describes and explains the procedures needed for successful implementation of Oracle Quoting.

### Oracle Quoting User Guide

This guide describes and explains the concepts and procedures that are helpful in using the application.

### Oracle Sales Online Implementation Guide

This guide contains the information needed to understand, implement, and use Oracle Sales Online. It brings together all the information needed for successful implementation of three Oracle Sales products: Oracle Field Sales, Oracle Sales Online, and Oracle TeleSales.

### Oracle Sales Online User Guide

This guide describes and explains the concepts and procedures that are helpful in using the application.

### Installation and System Administration

### Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11*i*. It provides a useful first book to read before an installation of Oracle Applications. This guide also introduces the concepts behind Applications-wide features such as Business Intelligence (BIS), languages and character sets, and Self-Service Web Applications.

### Installing Oracle Applications

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11*i*, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications, the Oracle8 technology stack, and the Oracle8*i* Server technology stack by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user's guides and implementation guides.

### Oracle Applications Supplemental CRM Installation Steps

This guide contains specific steps needed to complete installation of a few of the CRM products. The steps should be done immediately following the tasks given in the Installing Oracle Applications guide.

### Upgrading Oracle Applications

Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release 11*i*. This guide describes the upgrade process and lists database and product-specific upgrade tasks. You must be either at Release 10.7 (NCA, SmartClient, or character mode) or Release 11.0, to upgrade to Release 11*i*. You cannot upgrade to Release 11*i* directly from releases prior to 10.7.

### Maintaining Oracle Applications

Use this guide to help you run the various AD utilities, such as AutoUpgrade, AutoPatch, AD Administration, AD Controller, AD Relink, License Manager, and others. It contains how-to steps, screenshots, and other information that you need to run the AD utilities. This guide also provides information on maintaining the Oracle applications file system and database.

### Oracle Applications System Administrator's Guide

This guide provides planning and reference information for the Oracle Applications System Administrator. It contains information on how to define security, customize menus and online help, and manage concurrent processing.

### Oracle Alert User's Guide

This guide explains how to define periodic and event alerts to monitor the status of your Oracle Applications data.

### Oracle Applications Developer's Guide

This guide contains the coding standards followed by the Oracle Applications development staff. It describes the Oracle Application Object Library components needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards for Forms-Based Products*. It also provides information to help you build your custom Oracle Forms Developer 6*i* forms so that they integrate with Oracle Applications.

### Oracle Applications User Interface Standards for Forms-Based Products

This guide contains the user interface (UI) standards followed by the Oracle Applications development staff. It describes the UI for the Oracle Applications products and how to apply this UI to the design of an application built by using Oracle Forms.

## Other Implementation Documentation

### Multiple Organizations in Oracle Applications

This guide describes how to set up and use Oracle Proposals with Oracle Applications' Multiple Organization support feature, so you can define and support different organization structures when running a single installation of Oracle Proposals.

### Oracle Workflow Guide

This guide explains how to define new workflow business processes as well as customize existing Oracle Applications-embedded workflow processes.You also use this guide to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes.

### Oracle Applications Flexfields Guide

This guide provides flexfields planning, setup and reference information for the Oracle Proposals implementation team, as well as for users responsible for the ongoing maintenance of Oracle Applications product data. This manual also provides information on creating custom reports on flexfields data.

### Oracle eTechnical Reference Manuals

Each eTechnical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for a specific Oracle Applications product. This information helps you convert data from your existing applications, integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on Metalink

### Oracle Manufacturing APIs and Open Interfaces Manual

This manual contains up-to-date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes APIs and open interfaces found in Oracle Manufacturing.

### Oracle Order Management Suite APIs and Open Interfaces Manual

This manual contains up-to-date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes APIs and open interfaces found in Oracle Order Management Suite.

### Oracle Applications Message Reference Manual

This manual describes Oracle Applications messages. This manual is available in HTML format on the documentation CD-ROM for Release 11i.

### Oracle CRM Application Foundation Implementation Guide

Many CRM products use components from CRM Application Foundation. Use this guide to correctly implement CRM Application Foundation.

## Training and Support

### Training

Oracle offers training courses to help you and your staff master Oracle Proposals and reach full productivity quickly. You have a choice of educational environments. You can attend courses offered by Oracle University at any one of our many Education Centers, you can arrange for our trainers to teach at your facility, or you

can use Oracle Learning Network (OLN), Oracle University's online education utility. In addition, Oracle training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may want to use your organization's structure, terminology, and data as examples in a customized training session delivered at your own facility.

### Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle Proposals working for you. This team includes your Technical representative, Account Manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle8*i* server, and your hardware and software environment.

### Oracle*MetaLink*

Oracle*MetaLink* is your self-service support connection with web, telephone menu, and e-mail alternatives. Oracle supplies these technologies for your convenience, available 24 hours a day, 7 days a week. With Oracle*MetaLin*k, you can obtain information and advice from technical libraries and forums, download patches, download the latest documentation, look at bug details, and create or update TARs. To use MetaLink, register at (http://metalink.oracle.com).

**Alerts:** You should check Oracle*MetaLink* alerts before you begin to install or upgrade any of your Oracle Applications. Navigate to the Alerts page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade/Alerts.

**Self-Service Toolkit:** You may also find information by navigating to the Self-Service Toolkit page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade.

# Do Not Use Database Tools to Modify Oracle Applications Data

*Oracle STRONGLY RECOMMENDS that you never use SQL\*Plus*®*, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.*

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL\*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using Oracle Applications can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

# About Oracle

Oracle Corporation develops and markets an integrated line of software products for database management, applications development, decision support, and office automation, as well as Oracle Applications, an integrated suite of more than 160 software modules for financial management, supply chain management, manufacturing, project systems, human resources and customer relationship management.

Oracle products are available for mainframes, minicomputers, personal computers, network computers and personal digital assistants, allowing organizations to integrate different computers, different operating systems, different networks, and even different database management systems, into a single, unified computing and information resource.

Oracle is the world's leading supplier of software for information management, and the world's second largest software company. Oracle offers its database, tools, and applications products, along with related consulting, education, and support services, in over 145 countries around the world.

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# Part I

## Getting Started

This section contains the following chapters:

-
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# 1

# Introduction

This chapter provides information on the following topics:

- Section 1.1, "Oracle's E-Business Suite"
- Section 1.2, "Oracle E-Business Suite 11.5.9 Release"
- Section 1.3, "Oracle Proposals Overview"

## 1.1  Oracle's E-Business Suite

Oracle's E-Business Suite is a comprehensive web-based answer for business-to-business (B2B) and business-to-consumer (B2C) selling, marketing, analyzing, and servicing through the Internet. The Oracle E-Business Suite consists of both front-office Customer Relationship Management (CRM) applications and back-office Enterprise Resource Planning (ERP) applications. These applications automate marketing, sales, contracts, service, manufacturing, and supply chain processes, as well as financial operations, project management, human resources operations, and business intelligence systems.

The Oracle E-Business Suite sits on a multi-layer platform which includes:

- Oracle 9i Database
- Oracle 9i Application Server
- Common Services and Components
- Oracle Internet Business Intelligence

### Oracle 9*i* Database

All applications reside on the Oracle9*i* Database. The Oracle database drives enterprise E-Business applications, online transaction processing applications

(OLTP), query-intensive data warehouses, and high capacity web sites. Because the Oracle database is available on many different platforms, applications can scale from handheld to laptop to desktop to enterprise, providing consistent information over multiple channels.

### Oracle 9*i* Application Server

The Oracle 9*i* Application Server (Oracle 9*i*AS) is a middle-tier server which independently delivers the technology needed to build web sites and applications, create personalized portals, extract business intelligence, and manage a secure web site infrastructure.

### Common Services and Components

All the applications can leverage the common infrastructure and services components. Functionality includes Oracle Forms, Oracle Reports, Oracle Application Object Library (AOL), the Oracle JDeveloper and Oracle Discoverer development tools, the coding and UI standards, and other functionality used by the applications.

For example, you can extend the applications according to your business needs using flexfields. You can create and assign responsibilities using the system administrator responsibility. Also, you can use Oracle Workflow to configure background processes and set up notifications so that all the appropriate managers and groups are notified.

### Oracle Internet Business Intelligence

Above the E-Business Suite sits the Internet Business Intelligence application. This application integrates data from all of the E-Business Suite applications to provide key performance measurements, operating alerts, and management reports to every decision maker across the enterprise.

## 1.1.1 E-Business Suite Applications

Customers can seamlessly share data from front-end applications (CRM) to backend applications (ERP) in the Oracle E-Business Suite. The applications leverage Oracle's Common Application Architecture.

The Customer Relationship Management (CRM) applications encompass:

- Marketing suite
- Sales suite

- Contracts suite

- Service suite

- eCommerce suite

The Enterprise Resource Planning (ERP) applications include:

- Oracle Order Management

- Oracle Supply Chain Planning

- Oracle Manufacturing

- Oracle Financials

- Oracle Human Resources Management System

## Customer Relationship Management (CRM)

Companies use Oracle's CRM suite of applications to acquire, maintain, and enhance customer relationships, by assisting companies with marketing automation, sales force automation, contracts management, customer service and support, and business intelligence, in a multi-channel environment.

- The **Marketing** suite provides campaign planning and execution, budget management, list creation, reporting, and analysis tools. Marketing professionals use the Oracle Marketing applications to drive quality leads to sales, to expand reach, and to maximize marketing effectiveness by using a comprehensive set of marketing automation, analysis, and multi-channel execution capabilities. The Marketing suite offers seamless integration with sales, service, and operations.

- The **Sales** suite provides integrated tools for all players in the sales process, including field salespeople, telesales agents, distributors and resellers, sales executives, and Internet customers.

  Armed with up-to-the minute information regarding customers, leads and opportunities, as well as forecasts and compensation plans and projections, executives can proactively and effectively manage a sales force while providing the sales people with the information needed to close sales. Using this information, the field sales force, telesales teams, resellers, and web storefronts can collaborate in closing more business together as one sales team.

- The **Contracts** suite enables authoring, executing, and managing contracts, warranties and extended warranties, providing visibility to contract entitlements and the ability to proactively act upon contractual commitments.

Whether a buyer or a seller, issuing contracts or receiving them, the Contracts suite automates the full contract life cycle.

- The **Service** suite manages service activities with the goals of profitability, employee productivity, and enhanced customer satisfaction by comprehensively addressing service and support activities from initial contact with the customer through issue resolution. Automating service efforts can potentially transform an area that has historically proven to be a cost center into a revenue generator.

  This suite of applications provides customer support, field service, and depot repair functionality. In addition, Oracle Service offers complete visibility into spare parts availability, logistics, service billing, and customer contract entitlements. Oracle Customer Care provides full access to customer information from each touch point in the enterprise and to each customer care agent or other employees who interact with the customer. All of the Service products can be deployed across web, call center, and mobile field channels.

- The **eCommerce** suite of products aids in establishing profitable long-term relationships with customers through Internet availability, one-to-one marketing and personalized shopping experiences, as well as proactive support and self-service capabilities. Oracle eCommerce synchronizes all customer interactions and transactions by integrating web-based channels with traditional channels.

### Enterprise Resource Planning (ERP)

Companies use the ERP applications to control their back-office operations. For example:

- **Oracle Order Management** applications feature advanced configurator functionality, global available to promise, flexible pricing support, efficient delivery, high volume transactions, and the flexibility to adapt to changing business conditions.

- **Oracle Supply Chain Planning** applications provide the tools required to optimize flow of material, cash, and information across the extended supply chain.

- **Oracle Manufacturing** applications support all styles of manufacturing - engineer-to-order, discrete, process, flow, lot based, and project based manufacturing.

- **Oracle Financials** provide solutions for strategic planning, accounting, treasury, project management, and travel management.

- **Oracle Human Resources Management System** is a comprehensive solution for managing a company's human resources, allowing organizations to attract, retain and develop critical skills and knowledge on a global basis.

### Common Application Architecture

Oracle's Common Application Architecture includes functionality that supports both CRM and ERP applications. For example, Oracle's Trading Community Architecture (TCA), consists of a database schema and Application Programming Interfaces (APIs) that enable the modeling of complex business community relationships and the ability to enter business community data consistently throughout the enterprise. Because TCA is not hierarchical, Oracle applications can model complex B2B2C relationships and not to be limited to either a B2B or B2C implementation.

## 1.2 Oracle E-Business Suite 11.5.9 Release

This document describes functionality to be delivered in the Oracle E-Business Suite 11.5.9 release. If you are implementing this product prior to the release, using product minipacks or family packs, some new functionality may be dependent on integration with other Oracle products. Please consult MetaLink for relevant product patches and documentation.

## 1.3 Oracle Proposals Overview

Oracle Proposals allows users to generate dynamic proposals using templates. With Oracle Proposals, businesses can:

- Shorten the sales cycle by reducing from days to hours the time needed to generate a proposal

- Project a consistent and high quality professional image

- Free sales representatives to work with customers by automating the proposal process

Oracle Proposals streamlines proposal creation by automating time- and resource-consuming tasks. Users can generate proposals from templates that package recurring proposal elements such as cover letters, executive summaries, and product descriptions.

Central template administration guarantees standard and professional corporate proposals.

Oracle Proposals also allows proposal administration through:

- Template management

- Dynamic field administration

Oracle Proposals is a part of the Oracle E-Business Suite, an integrated suite of enterprise applications designed to transform a traditional business into an e-business.

## 1.3.1 Oracle Proposals Features

Oracle Proposals includes the following features:

- Proposal Creation

- Guided Proposal Content Building

- Proposal Document Generation

- E-Mail Delivery

- Proposal Views and Searches

- Proposal Templates

- Dynamic Fields

- Proposal Components for Standardized Content

### Proposal Creation

Users can create either standalone proposals, or proposals based on quotes in Oracle Quoting. When creating a proposal, users select a master proposal template from a list of possible templates and specify the proposal name, description, and due date. For standalone proposals, users also select a customer. For a quote-based proposal, users launch proposal creation from Oracle Quoting's Proposal tab, and relevant quote information is automatically pulled into the proposal.

### Guided Proposal Content Building

Oracle Proposals enables users to track their progress while building a proposal, so they can see at a glance whether proposal components are complete. Users can determine the order of proposal components, and include or exclude optional components. Dynamic fields in the components capture required information from objects specified by the user.

### Proposal Document Generation

Once users have built the proposal content, they can generate a proposal document in RTF format. This document is the physical file that is shared with the customer. Users can regenerate documents as often as needed. The generated documents are versioned automatically and stored in the database. Users can view, download, edit, and re-upload the documents as needed.

### E-Mail Delivery

Using Oracle Proposals, users can e-mail proposals to customers. The user selects the appropriate proposal documents, specifies customer contacts, and then e-mails them to the contacts and other required recipients.

### Proposal Views and Searches

The Oracle Proposals homepage displays recently updated proposals and proposals due to customers soon. Users can perform searches on criteria such as proposal name, customer data, and creation or due date, etc.

### Proposal Templates

Oracle Proposals uses proposal templates, which are predefined, standard boilerplate documents from which proposals are generated. Templates outline a proposal's structure. A template is made up of components such as cover letters, product descriptions, and collateral.

Administrators create templates, define template categories, and determine template components, component order, and component status. The template name and category help users select the most appropriate template for each proposal.

### Dynamic Fields

Administrators can include dynamic fields in the component documents to reference information from objects previously captured in the sales cycle, for example, quotes.

Values for dynamic fields can come from the user, database objects, or custom Java programs, retrieving data from various objects and object sources.

Dynamic fields for values from Oracle E-Business Suite Quote and Proposal objects are seeded with the application. Administrators can create user-defined and custom dynamic fields.

## Proposal Components for Standardized Content

Proposal components are pieces of standard content that are included in templates, such as cover letters and executive summaries. Administrators can define components and create multiple documents for each component, since the style and content required may vary from one template to another. For example, the component *Cover Letter* can include the documents *Simple Cover Letter* and *Professional Cover Letter*.

The documents are RTF (Rich Text Format) files that store content such as standard text, graphs, tables, dynamic fields, etc.

# 2

# Before You Begin

This chapter provides an overview of what you need to have installed, implemented, and verified before implementing Oracle Proposals. Topics include:

- Section 2.1, "Related Documentation"

- Section 2.2, "Installation Verification"

- Section 2.3, "Oracle Proposals Conditional Dependencies"

- Section 2.4, "Integration Points"

- Section 2.5, "Technology Stack"

## 2.1 Related Documentation

*Oracle Proposals User Guide, Release 11i*

*Oracle Quoting Implementation Guide, Release 11i*

*Oracle Applications System Administrator's Guide, Release 11i*

*Oracle CRM Application Foundation Implementation Guide, Release 11i*

*Oracle CRM Technology Foundation Implementation Guide, Release 11i*

*Oracle CRM Technology Foundation Concepts and Procedures, Release 11i*

*Implementing Oracle (HRMS), Release 11i.*

## 2.2 Installation Verification

Before proceeding with the implementation of Oracle Proposals, you must verify that you have installed Oracle Applications correctly. See *Installing Oracle*

*Applications* and *Oracle CRM Application Foundation Implementation Verification Checklists Release 11i* for more information.

## 2.3 Oracle Proposals Conditional Dependencies

Oracle Proposals requires the setup and installation of Oracle Quoting if your users will be adding quotes to a proposal, creating a proposal from a quote, or using the quote dynamic field substitution functionality. Please see the *Oracle Quoting Implementation Guide, Release 11i* for details.

## 2.4 Integration Points

Listed below is basic information on Oracle Proposals integrations. Please see for more details.

### 2.4.1 Oracle Customer Relationship Management (CRM) Foundation

For information on CRM Foundation usage, please see the *Other Sources of Information* section in the Preface of this guide.

- **Resource Manager**: Resource Manager is a central repository for all resources that is used to import and view resources, define resources and roles, create teams and groups, and organize resources within those teams and groups.

- **Interaction History**: Interaction History is a collection of tables and business logic that records touch points between customers and resources for Oracle Applications. Interaction History if part of the Oracle CRM Foundation product suite. After CRM Foundation is installed, clients can access the Interaction History graphical interface. Interaction History records can be browsed and retrieved, integrating its graphical interface into an application or by using its views. See the *Oracle CRM Application Foundation Implementation Guide, Release 11i* for details*.

### 2.4.2 Third Party Integrations

- Oracle Proposals generates proposal documents in RTF (Rich Text Format) format viewable in 3rd party word processors. Integration with word processing/editing programs with RTF creation capability is necessary to:

  - Store standard component content, including dynamic fields and formatting style.

- Generating proposal documents.

- A zipping application may also be needed to unzip proposal documents from a zipped source.

## 2.5  Technology Stack

**Desktop Tier**

- RTF (Rich Text Format) editor that supports RTF specification 1.5 and above, for example MS Word 2000.

# Part II

## Implementing Oracle Proposals

This section contains the following chapters:

# 3

# Implementation Overview

## 3.1 Oracle Proposals Implementation Overview

Mandatory implementation steps are required for Oracle Proposals to function properly. Oracle recommends that you implement Oracle Proposals in the order listed.

This chapter includes:

- Section 3.2, "Process Description"
- Section 3.3, "Implementation Task Sequence"

## 3.2 Process Description

The steps needed for implementing Oracle Proposals are listed in the order in which they should be carried out.

To effectively implement Oracle Proposals, you must perform the following tasks:

- Create users, or identify existing users and assign those with administrative responsibilities the **Proposals Main** menu, and assign the **Proposal Homepage** function to the menu of users with sales representative responsibilities.
- Assign any new users the appropriate menu/function.
- Create Template Categories
- Create Dynamic Fields (Optional)
- Create Proposal Components
- Create RTF files
- Associate files to Components

- Create Templates
- Publish Templates

## 3.3 Implementation Task Sequence

The following table describes the order and process of implementing Oracle Proposals. Note that the creation of RTF file content (Step 5 on this list) can be done at anytime before components are associated with files.

*Table 3–1   Oracle Proposals Process*

| Step | Description | Performed Where | Performed By |
|------|-------------|-----------------|--------------|
| 1 | Create users, or identify existing users and verify their responsibility. | Forms | System Administrator |
| 2 | Assign user appropriate menu or function:<br>■ Proposal Homepage (function) or:<br>■ Proposal Main (menu) | Forms | System Administrator |
| 3 | Create Template Category | HTML | Oracle Proposals Administrator |
| 4 | Create Template Components. | HTML | Oracle Proposals Administrator |
| 5 | Create any Dynamic Fields | HTML | Oracle Proposals Administrator |
| 6 | Create RTF file content (Can be done anytime before components are associated with files.) | Word processing program | Any Oracle Proposals User |
| 7 | Associate files to Components | HTML | Oracle Proposals Administrator |
| 8 | Create Templates | HTML | Oracle Proposals Administrator |
| 9 | Publish Templates in current language | HTML | Oracle Proposals Administrator |

# 4

# Implementation Tasks for Oracle Proposals

Perform the following tasks to implement Oracle Proposals:

- Section 4.1, "Setting up Users"

- Section 4.2, "User Types Overview"

- Section 4.3, "User Type Setup"

- Section 4.4, "Administration Tasks"

## 4.1 Setting up Users

This section covers the following:

- Oracle Applications Forms Login

**Note:** Users can also be set up using the Oracle System Administrator Console. Please see the following documentation for additional user setup instructions and information:

- *Oracle Applications System Administrator's Guide, Release 11i*

- *Oracle CRM Technology Foundation Implementation Guide, Release 11i*

- *Oracle CRM Technology Foundation Concepts and Procedures, Release 11i*

### 4.1.1 Oracle Applications Forms Login

The System Administrator (sysadmin) assigns the FND menus for Oracle Proposals users.

Before making Oracle Forms settings, verify that Oracle Application is up and running. Because some setup steps require running concurrent programs, you must

ensure that the Concurrent Managers are running. Consult your Applications System Administrator for additional information.

For more information on Oracle Applications, refer to *Oracle Applications Concepts*, *Release 11i.*

# 4.2  User Types Overview

There is one FND menu type, and one function for Oracle Proposals users:

- Oracle Proposals Main User: Proposal Main FND Menu

- Oracle Proposals Homepage User: Proposal Homepage Function

For more information on Oracle Proposals user information, please see Appendix B, "User Data".

## 4.2.1  Oracle Proposals Main User: Proposal Main FND Menu

Users assigned the **Proposal Main** FND menu (PRP_MAIN_MENU) have access to both the Administration tab and the Dashboard tab. From the Administration tab, they can view, access, and manage administrative data including:

- Templates

- Components

- Dynamic Fields

- Template Categories

From the Homepage tab, these users can:

- Create Proposals

- View Proposals

- Modify Proposals

- Generate Proposals

- Email Proposals

- Search for Proposals

Administrators are also able to create proposals using unpublished templates. Administrators, like regular users, can only view and update those proposals they have created. There is no administrative access to all users' proposals.

### 4.2.2  Oracle Proposals Homepage User: Proposal Homepage Function

Users assigned the **Proposal Homepage** FND function (PRP_PR_PROPOSAL_
HOME) who are also FND users have access to the Dashboard tab and its basic user
functions. They must be either set up as a Resource or an Employee. They will **not**
have access to the Administration tab where administrative data can be created,
modified, or viewed. Homepage users can:

- Create Proposals

- View Proposals

- Modify Proposals

- Generate Proposals

- Email Proposals

- Search for Proposals

These users need to have the PRP_PR_PROPOSAL_HOME function assigned to the
menu assigned to their responsibility. Any menu can be created and then the
function can be assigned to it.

## 4.3  User Type Setup

Listed below are instructions for creating users for Oracle Proposals. Topics include:

- Creating a Resource

- Creating an FND user and Assigning Responsibilities, FND Menus

To access Oracle Proposals, a user must be set up as an FND User either as an
Employee or a Resource. When a user logs into Oracle Proposals, a check is made to
against the FND table. If the user is set up as a Resource in Resource Manager, then
the user's information such as Name, title, phone, fax, email id and address is
picked from there. Setup is critical for a successful implementation. If the user
information is not available in either FND or Resource Manager, the user's
information will be blank.

Care must be taken to ensure that if the user is a resource, all user information is
stored correctly in Resource Manager. Oracle Proposals checks to see if the FND
User is a resource first. If the user is a resource, that path is chosen and all
information is obtained from Resource Manager.

### 4.3.1  Creating a Resource

If you want all users to have access to Oracle Proposals, they must be set up as valid resources in Oracle Resource Manager.

You can create a resource either by entering the user information into Resource Manager, or by importing an employee from Oracle Human Resources into Resource Manager.

For information on creating a resource, see the *Oracle CRM Application Foundation Concepts and Procedures*.

### 4.3.2  Creating an FND user and Assigning Responsibilities, FND Menus

The appropriate menu - either Proposal Main or Proposal Homepage - needs to be added to the responsibility given to users. Once the FND user has been created and a responsibility has been chosen for that user, then the appropriate Oracle Proposals menu can be assigned to that responsibility.

For instruction on assigning menus to responsibilities, and creating menus, see the *Oracle Applications System Administrator's Guide, Release 11i*.

## 4.4  Administration Tasks

If you need instructions on the template creation and management process, please see the *Oracle Proposals User Guide* for administration task steps and information.

# Part III

## Post Implementation Tasks

This section contains the following chapter:

# 5

# Verify the Implementation

## 5.1 Oracle Proposals Implementation Verification Tasks

This chapter contains material useful in verifying the implementation of Oracle Proposals.

Verify that you can perform the following tasks after you have finished:

- Creating users and assigning the appropriate menus (Chapter 4)
- Creating and administering Template Categories, Components, and Templates (See the *Oracle Proposals User Guide*)
- E-mail a Proposal document (See the *Oracle Proposals User Guide*)

### 5.1.1 Verification Task List

You must be able to complete these tasks successfully, or Oracle Proposals has not been implemented properly. For instructions on how to performs these tasks, consult the *Oracle Proposals User Guide*.

- Create a Proposal
- Generate a Proposal Document

If you are able to create and generate a proposal, the implementation has been successful.

# Part IV

## Integration of Oracle Products

This section contains the following chapter:

# 6

# Oracle Proposals Integrations

This chapter contains information on integration with Oracle Quoting and setting up create proposal from quote functionality.

## 6.1 Integration with Oracle Quoting

Oracle Proposals supports integration with Oracle Quoting. Proposals can only be generated from quotes if Oracle Quoting is installed.

### 6.1.1 Setting up Create Proposal from Quote Functionality

Oracle Quoting integrates with Oracle Proposals for creating proposals from quote functionality. The objective of Oracle Proposals/Oracle Quoting integration is to extract quote information and pull it into the proposal. When a quote is updated, Oracle Proposals pulls in the latest quote information when a proposal is generated.

> **Note:** Proposals that are generated before a quote is updated will need to be regenerated to reflect the quotes current content.

In order to integration Oracle Quoting with Oracle Proposals, you must have Oracle Quoting installed. Please see the *Oracle Quoting Implementation Guide* for details.

## 6.2 Third Party Integration

- Oracle Proposals generates proposal documents in RTF (Rich Text Format) format viewable in 3rd party word processors. Integration with word processing/editing programs with RTF creation capability is necessary to:

- Store standard component content, including dynamic fields as well as formatting style.

- Generating proposal document.

# Part V

## Appendixes

This section contains the following appendixes:

- Appendix A, "Oracle Proposals Profile Options"

- Appendix B, "User Data"

-

# A

# Oracle Proposals Profile Options

This chapter describes profile option settings that are required for successful implementation. Topics include:

- Before You Begin

- Setting Profile Options

- Finding Responsibility ID Values

- Current Oracle Proposals Profile Options

## A.1 Before You Begin

Before making Oracle Forms settings, ensure that all Oracle Applications server processes are up and running. In particular, if you stopped concurrent managers before applying Oracle Applications patchsets, restart them now by changing to $COMMON_TOP/admin/scripts, and executing adcmctl.sh <APPS username/APPS password> start.

## A.2 Setting Profile Options

Use the following procedure to set any profile option.

### Steps

1. Log in to Oracle Forms with the System Administrator responsibility.

2. Go to **Profile > System.**

   The Find System Profile Values window opens.

3. Check the level(s) at which you want to set the profile option. The available levels are listed below:

   - **Site**

   - **Application**—If you select this level, choose the application from the Application LOV for which you want to set the profile option.

   - **Responsibility**—If you select this level, choose the responsibility from the Responsibility LOV for which you want to set the profile option.

   - **User**—If you select this level, choose the user from the User LOV for whom you want to set the profile option.

4. In the Profile field, enter the profile name, such as `PRP: Default Days for Recent Proposals` or a wildcard search criterion such as `PRP%`.

5. Select **Find.** The System Profile Values form opens with the results of your search.

6. Verify or set the profile option(s) at the levels that you selected.

## A.3 Finding Responsibility ID Values

You must know the APPLICATION_ID values and RESPONSIBILITY_ID values before you can set the required Oracle CRM Technology Foundation (JTT) profile options for users.

> **Note:** The APPLICATION_ID value for the responsibilities is 694.

Use the following procedure to find the APPLICATION_ID value and RESPONSIBILITY_ID value of a responsibility.

### Steps

1. Log in to Oracle Forms with the System Administrator responsibility.

2. Navigate to **Security > Responsibility > Define.**

   The Responsibilities form opens.

3. Navigate to **View > Find.** Search for the responsibility, highlight it, and click **OK** in the search window.

   The Responsibilities form is populated with the record for the responsibility that you chose.

4. With your cursor in any field of the record, navigate to **Help > Diagnostics > Examine.**

   The Examine Field and Variable Values window opens.

5. In the Examine Field and Variable Values window, choose **APPLICATION_ID** from the Field LOV.

   The Value field in the Examine Field and Variable Values window is populated with the value of APPLICATION_ID.

6. In the Examine Field and Variable Values window, choose **RESPONSIBILITY_ ID** from the Field LOV.

   The Value field in the Examine Field and Variable Values window is populated with the value of RESPONSIBILITY_ID.

## A.4  Current Oracle Proposals Profile Options

When implementing Oracle Proposals, you must set specific profile options.

Current Oracle Proposals Profile Options:

- PRP: Access to Unpublished Templates

- PRP: Maximum File Size for Online Generation

- PRP: Default Days for Recent Proposals

- PRP: Default Days for Due Proposals

- PRP: SMTP Server Name

- PRP: SMTP Server Port

*Table A–1   Current Oracle Proposals Profile Options*

| Profile Option Name | Default Value | Description |
| --- | --- | --- |
| Access to Unpublished Templates | No | Enables administrators to view and create proposals from unpublished templates. |
| Maximum File Size For Online Generation | Null | Determines maximum file size for proposals that will be generated online. |

*Table A–1    Current Oracle Proposals Profile Options(Cont.)*

| Profile Option Name | Default Value | Description |
| --- | --- | --- |
| Default Days for Recent Proposals | 10 | Determines Dashboard display for recent proposals. |
| Default Days for Due Proposals | 10 | Determines Dashboard display for proposals due within a certain number of days. |
| SMTP Server Name | N/A | Provides the SMTP server name to be used for emailing proposals |
| SMTP Server Port | N/A | Provides the port number of the SMTP server to be used in connecting to the SMTP server. |
| | | If no value is set, email is sent using the default port (port number 25) of the SMTP server. |

## A.4.1  PRP: Access to Unpublished Templates

When set to **Yes,** for users with the Proposal Administrator responsibility, enables such users to use unpublished templates to create proposals.

**Name**: Access to Unpublished Templates

**Set at**: Enabled at all levels

**Default Value**: No

## A.4.2  PRP: Maximum File Size for Online Generation

When users click on the Generate Proposal Document button, the set value determines whether the proposal document is generated *online* or *offline*. The profile value determines the maximum size for a file that can be generated online. Any document that surpasses this value must be generated offline. Please see the *Oracle Applications System Administrator's Guide* for instructions on running the concurrent program for offline generation.

**Name**: Maximum File Size for Online Generation

**Set at**: Site level (not enabled for other levels)

**Default Value**: Null

**Default behavior**: If it is null, generation is done online

### A.4.3 PRP: Default Days for Recent Proposals

This seeded profile option determines the display option for the Dashboard page, reflecting those proposals that have been updated in *X* days, where *X* represents the chosen value.

**Name**: Default Days for Recent Proposals

**Set at**: Application (Seeded), Responsibility and User levels

**Default Value**: 10

### A.4.4 PRP: Default Days for Due Proposals

This seeded profile option determines the display option for the Dashboard page, reflecting those proposals that have a due date within *X* days, where *X* represents the chosen value.

**Name**: Default Days for Due Proposals

**Set at**: Application (Seeded), Responsibility and User levels

**Default Value**: 10

### A.4.5 PRP: SMTP Server Name

This profile option provides the SMTP server name to be used for emailing proposals.

**Name**: SMTP Server Name

**Set at**: Site Level

**Default Value**: N/A

### A.4.6 PRP: SMTP Server Port

This profile option provides the port number of the SMTP server to be used in connecting to the SMTP server. If no value is set, email is sent using the default port (port number 25) of the SMTP server.

**Name**: SMTP Server Port

**Set at**: Site Level

**Default Value**: N/A

# B

# User Data

This appendix lists Oracle Proposals user information.

See *Oracle Applications System Administrator's Guide, Oracle CRM Technology Foundation Implementation Guide,* and *Oracle CRM Technology Foundation Concepts and Procedures* for more information.

## B.1 Oracle Proposals Users

There are two types of Proposals users:

- Users who utilize the application to create, generate, modify, and send proposals to customers and also perform the administrative functions of setting up and managing data. These users are assigned the **Proposal Main** menu (PRP_MAIN_MENU) which provides them with access to both the Dashboard and Administration tabs.

- Users who **only** perform the proposal creation, search, e-mail, and modification functions. These users are given the **Proposal Homepage** function (PRP_PR_ PROPOSAL_HOME) which provides them with access to the Dashboard tab only. This function needs to be given to the menu assigned to this user's responsibility.

> **Note:** Users can only see and update those proposals that they have created.

The following table summarizes the user data for Oracle Proposals

*Table B–1   Oracle Proposals Customer UI User Data*

| Name | Tasks | Homepage |
| --- | --- | --- |
| Proposal Main (PRP_MAIN_ MENU) | Users assigned this menu can view, access, and create administrative data including:<br><br>Templates<br>Components<br>Component documents<br>Template categories<br>Dynamic fields<br><br>These users can also create, view, e-mail, search for, and modify proposals, as well as create proposals using unpublished templates. | Administration.<br><br>Users assigned this menu have access to **both** the Dashboard and Administration tabs and all their functions. |
| Proposal Homepage (PRP_PR_ PROPOSAL_ HOME) | Create, view, e-mail, search for, and modify proposals. | Dashboard.<br><br>Users given this function have access to the Dashboard tab **only** and its functions. They do **not** have access to the Administration tab. |

# Glossary

**Component**

Piece of standard content that might be included in a proposal template.

**Component Code**

Unique, non-transferable code for proposal components.

**Component Content**

Content that is referenced to the physical component content. Content that is the physical standard content (e.g. text, graphics, tables, etc.) that represents the proposal component.

**Component Document**

A component document references piece of standard content that might be included in a proposal template. Standard content can include any type of pre-defined text, tables, graphs, gifs, etc. that are in RTF format.

**Component Order**

Order in which the components are generated into the proposal output document.

**CRM Object**

CRM Object that is referenced by the specific proposal component. Used to determine which UI to draw from when providing sales proposal detail. An example of a CRM Object that can be used within a Proposal Component is a quote from Oracle

Quoting.

### Document

An individual look-and-feel. Styles are created in Oracle Proposals by creating different RTF files and then associating these documents to individual components.

### Dynamic Field

References to the dynamic fields used to generate the proposal output. Based on specific template chosen. Dynamic fields can either be seeded by application or created by users. Placeholder within a pre-defined piece of content that references a specific piece of information that gets substituted into the content during creation.

### Dynamic Field Value

Value of dynamic field. Value that the user enters or chooses. Dynamic fields can either be seeded by application or created by users.

### List of Values (LOV)

A list of valid values in a text field, from which users must choose.

### Proposal

Customer presentable, customizable and manageable document. A proposal positions a product or service as a solution to a customer's business problem.

### Proposal Due Date

Date on which proposal is due to the customer.

### Proposal Name

Physical name of the proposal output file. At generation time, the name is composed of the proposal name concenated with the appropriate extension depending on the format of the output file.

### Proposal Output

The physical file that gets created for a proposal as part of the generation process. There might be multiple version of proposal output files created during the life of a proposal. The physical proposal output is the object that gets shared with the customer.

### Remarks

A remark, or long description, that is entered every time a new proposal output is uploaded.

### RTF file

Rich Text Format file. RTF files are ASCII files with special commands to indicate formatting information. The final generated version of a single proposal document is in RTF format. Proposal component files are the physical standard content in RTF format representing the proposal component.

### Standalone Proposal

A proposal that is generated using all original data, as opposed to a proposal created from a quote.

### Status

Status of the proposal output file. Determines where in the proposal process the file was generated or uploaded. Values are Draft and Final.

### Template

Pre-defined standard boilerplate document that users select to create a proposal for a customer. Contains components.

### Template Category

Group or type of template.

### Template List

A displayed list of templates. You must choose a template to create a proposal based on.

### Version

Version of the proposal output file. Version number is automatically created every time a proposal is generated or uploaded.