

# PeopleSoft®

---

## PeopleSoft Proposal Management 8.8 PeopleBook

---

**December 2003**

PeopleSoft Proposal  
Management 8.8 PeopleBook  
SKU FSCM88PMT-B 1203  
Copyright 1992-2003 PeopleSoft, Inc. All rights reserved.

All material contained in this documentation is proprietary and confidential to PeopleSoft, Inc. ("PeopleSoft"), protected by copyright laws and subject to the nondisclosure provisions of the applicable PeopleSoft agreement. No part of this documentation may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, including, but not limited to, electronic, graphic, mechanical, photocopying, recording, or otherwise without the prior written permission of PeopleSoft.

This documentation is subject to change without notice, and PeopleSoft does not warrant that the material contained in this documentation is free of errors. Any errors found in this document should be reported to PeopleSoft in writing.

The copyrighted software that accompanies this document is licensed for use only in strict accordance with the applicable license agreement which should be read carefully as it governs the terms of use of the software and this document, including the disclosure thereof.

PeopleSoft, PeopleTools, PS/nVision, PeopleCode, PeopleBooks, PeopleTalk, and Vantive are registered trademarks, and Pure Internet Architecture, Intelligent Context Manager, and The Real-Time Enterprise are trademarks of PeopleSoft, Inc. All other company and product names may be trademarks of their respective owners. The information contained herein is subject to change without notice.

## Open Source Disclosure

PeopleSoft takes no responsibility for its use or distribution of any open source or shareware software or documentation and disclaims any and all liability or damages resulting from use of said software or documentation. The following open source software may be used in PeopleSoft products and the following disclaimers are provided.

Apache Software Foundation

This product includes software developed by the Apache Software Foundation (<http://www.apache.org/>). Copyright (c) 1999-2000 The Apache Software Foundation. All rights reserved.

THIS SOFTWARE IS PROVIDED "AS IS" AND ANY EXPRESSED OR IMPLIED WARRANTIES, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE ARE DISCLAIMED. IN NO EVENT SHALL THE APACHE SOFTWARE FOUNDATION OR ITS CONTRIBUTORS BE LIABLE FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, EXEMPLARY, OR CONSEQUENTIAL DAMAGES (INCLUDING, BUT NOT LIMITED TO, PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES; LOSS OF USE, DATA, OR PROFITS; OR BUSINESS INTERRUPTION) HOWEVER CAUSED AND ON ANY THEORY OF LIABILITY, WHETHER IN CONTRACT, STRICT LIABILITY, OR TORT (INCLUDING NEGLIGENCE OR OTHERWISE) ARISING IN ANY WAY OUT OF THE USE OF THIS SOFTWARE, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGE.

OpenSSL

Copyright (c) 1998-2003 The OpenSSL Project. All rights reserved.

THIS SOFTWARE IS PROVIDED BY THE OpenSSL PROJECT "AS IS" AND ANY EXPRESSED OR IMPLIED WARRANTIES, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE ARE DISCLAIMED. IN NO EVENT SHALL THE OpenSSL PROJECT OR ITS CONTRIBUTORS BE LIABLE FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, EXEMPLARY, OR CONSEQUENTIAL DAMAGES (INCLUDING, BUT NOT LIMITED TO, PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES; LOSS OF USE, DATA, OR PROFITS; OR BUSINESS INTERRUPTION) HOWEVER CAUSED AND ON ANY THEORY OF LIABILITY, WHETHER IN CONTRACT, STRICT LIABILITY, OR TORT (INCLUDING NEGLIGENCE OR OTHERWISE) ARISING IN ANY WAY OUT OF THE USE OF THIS SOFTWARE, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGE.

SSLeay

Copyright (c) 1995-1998 Eric Young. All rights reserved.

THIS SOFTWARE IS PROVIDED BY ERIC YOUNG "AS IS" AND ANY EXPRESS OR IMPLIED WARRANTIES, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE ARE DISCLAIMED. IN NO EVENT SHALL THE AUTHOR OR CONTRIBUTORS BE LIABLE FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, EXEMPLARY, OR CONSEQUENTIAL DAMAGES (INCLUDING, BUT NOT LIMITED TO, PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES; LOSS OF USE, DATA, OR PROFITS; OR BUSINESS INTERRUPTION) HOWEVER CAUSED AND ON ANY THEORY OF LIABILITY, WHETHER IN CONTRACT, STRICT LIABILITY, OR TORT (INCLUDING NEGLIGENCE OR OTHERWISE) ARISING IN ANY WAY OUT OF THE USE OF THIS SOFTWARE, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGE.

Loki Library

Copyright (c) 2001 by Andrei Alexandrescu. This code accompanies the book:

Alexandrescu, Andrei. "Modern C++ Design: Generic Programming and Design Patterns Applied". Copyright (c) 2001. Addison-Wesley. Permission to use, copy, modify, distribute and sell this software for any purpose is hereby granted without fee, provided that the above copyright notice appear in all copies and that both that copyright notice and this permission notice appear in supporting documentation.

# Contents

## General Preface

<b>About These PeopleBooks.....</b>	<b>ix</b>
PeopleSoft Application Prerequisites.....	ix
PeopleSoft Application Fundamentals.....	ix
Related Documentation.....	x
Obtaining Documentation Updates.....	x
Ordering Printed Documentation.....	x
Typographical Conventions and Visual Cues.....	xi
Typographical Conventions.....	xi
Visual Cues.....	xii
Comments and Suggestions.....	xiii
Common Elements in These PeopleBooks .....	xiii

## Preface

<b>PeopleSoft Proposal Management Preface.....</b>	<b>xv</b>
Application Fundamentals.....	xv
Pages With Deferred Processing.....	xv
Common Elements Used in This PeopleBook.....	xvi

## Chapter 1

<b>Getting Started With PeopleSoft Proposal Management.....</b>	<b>1</b>
PeopleSoft Proposal Management Overview.....	1
PeopleSoft Proposal Management Business Processes.....	5
PeopleSoft Proposal Management Integrations.....	6
PeopleSoft Proposal Management Implementation.....	7

## Chapter 2

<b>Navigating in PeopleSoft Proposal Management.....</b>	<b>13</b>
Navigating in PeopleSoft Proposal Management.....	13
Pages Used to Navigate in PeopleSoft Proposal Management.....	13

**Chapter 3**

<b>Defining Your Operational Structure.....</b>	<b>15</b>
Understanding Integration Templates.....	15
Understanding Business Units.....	15
Project Costing Business Units.....	16
Contracts Business Units.....	16
Understanding Products.....	16
Understanding Installation Options.....	17
Overall Options.....	18
Application-Specific Installation Options.....	18
Project Delete Utility.....	19
Defining Proposal Management Defaults and Confidence Levels for the Business Units.....	19
Pages Used to Define Proposal Management Defaults and Confidence Levels for the Business Units.....	20
Defining Proposal Management Defaults for the Project Costing Business Unit.....	20
Defining Contracts Business Unit Defaults for PeopleSoft Proposal Management.....	22
Defining Confidence Levels for PeopleSoft Proposal Management.....	23

**Chapter 4**

<b>PeopleSoft Proposal Management Security.....</b>	<b>25</b>
Understanding PeopleSoft Proposal Management Security.....	25
Multilevel Security.....	25
Security by Department and User ID.....	26

**Chapter 5**

<b>Structuring PeopleSoft Proposal Management.....</b>	<b>29</b>
Understanding PeopleSoft Proposal Management Structure.....	29
Customer Information.....	29
Proposal Contacts.....	30
Project Roles and Rates.....	30
Proposal Planners.....	30
Establishing Proposal Management Information.....	31
Pages Used to Establish Proposal Management Information.....	31
Creating Activity ID Templates.....	31
Creating Budget Item Types.....	32
Creating Budget Items.....	32
Creating Key Words.....	33

**Chapter 6**

<b>Preparing, Generating, and Viewing Proposal Information.....</b>	<b>35</b>
Understanding the Proposal Preparation Process.....	35
Understanding Project Teams.....	36
Project Teams.....	37
Project Delete Utility.....	37
Understanding Contract Generation.....	37
Pre-Spending.....	38
The Contract Generation Process.....	38
Contract General.....	39
Contract Lines.....	39
Billing Plans.....	39
Revenue Recognition Plans.....	40
Projects and Activities.....	41
Rate Templates.....	41
Budget Generation.....	42
Prerequisites.....	43
Preparing and Generating Proposal Information.....	43
Page Used to Prepare and Generate Proposal Information.....	43
Entering Proposal Information.....	43
Configuring Time Defaults, Bill Options, and Security.....	47
Pages Used to Configure Time Defaults, Bill Options, and Security.....	48
Configuring Proposal Time Defaults.....	48
Setting Up Proposal Billing Options and Security .....	49
Entering Time and Expense Estimates.....	50
Pages Used to Enter Time and Expense Estimates.....	51
Creating Time and Resource Estimates.....	52
Making Adjustments to the Bill Rate.....	55
Creating Expense Estimates.....	56
Entering Project Control Details.....	57
Adding Attachments.....	58
Adding Key Words.....	59
Viewing Time and Expense Summary Information.....	60
Using the My Proposals Page.....	61
Pages Used to View, Add, and Remove Proposals.....	61
Viewing Proposal Information.....	61
Adding and Removing Proposals.....	62
Viewing CRM-Related Information.....	63
Page Used to View CRM-Related Information.....	63
Viewing CRM-Related Information.....	63

**Chapter 7**

<b>Copying Projects, Versions, and Proposals.....</b>	<b>65</b>
Copying Projects.....	65
Page used to Copy Projects.....	65
Copying Projects.....	65
Copying Proposal Versions.....	67
Page Used to Copy Proposal Versions.....	67
Copying Proposal Versions.....	67
Copying Proposal Information.....	68
Page Used to Copy Proposal Information.....	68
Copying Proposal Information.....	68

**Chapter 8**

<b>Generating PeopleSoft Proposal Management Reports.....</b>	<b>71</b>
Understanding Proposal Reports.....	71
Generating Proposal Reports.....	71
Page Used to Generate Proposal Reports .....	71
Generating Proposal Reports.....	72
Generating Pipeline Reports.....	72
Page Used to Generate Pipeline Reports.....	72
Generating Pipeline Reports.....	72
Generating Resource Reports.....	73
Page Used to Generate Resource Reports.....	73
Generating Resource Reports.....	73
Retrieving Proposal Information.....	74
Page Used to Retrieve Proposal Information.....	74
Retrieving Proposal Information.....	74

**Chapter 9**

<b>Administering Projects.....</b>	<b>77</b>
Understanding How Projects are Used in Proposal Management.....	77
Project Control.....	77
Transaction Flow Control.....	78
Project Analysis.....	78
Transaction Review.....	79
Analysis Inquiries.....	79

**Chapter 10**

<b>Integrating with PeopleSoft Billing.....</b>	<b>81</b>
Understanding the Billing Process.....	81
System Preparation.....	81
Process Overview.....	82
The Contracts/Billing Interface Process.....	85
The Billing Interface Process.....	85
Billing Worksheet Approval.....	85
Billing Worksheet Deletion.....	85
The Finalization Process.....	86
The Projects/Contracts Interface Process.....	86
Deferred Revenue Accounting.....	86

**Chapter 11**

<b>Integrating PeopleSoft Proposal Management with Other Applications.....</b>	<b>87</b>
Understanding Integration Process Flows.....	87
PeopleSoft Customer Relationship Management.....	89
PeopleSoft Contracts and PeopleSoft Project Costing.....	93
PeopleSoft Time and Labor.....	94
PeopleSoft General Ledger.....	94
PeopleSoft Commitment Control.....	95
PeopleSoft Receivables.....	95
The Procurement Process .....	96
PeopleSoft Purchasing.....	96
PeopleSoft Inventory.....	97
PeopleSoft Payables.....	97
Integrating Proposal Management with Third-Party Systems.....	97

**Appendix A**

<b>PeopleSoft Proposal Management Reports.....</b>	<b>99</b>
PeopleSoft Proposal Management Reports: A to Z.....	99
PeopleSoft Proposal Management Proposal Reports.....	99
PeopleSoft Proposal Management Resource Demand Report.....	100
PeopleSoft Proposal Management Revenue Pipeline Reports.....	100

Contents

<b>Glossary of PeopleSoft Terms.....</b>	<b>101</b>
<b>Index .....</b>	<b>117</b>

# About These PeopleBooks

PeopleBooks provide you with the information that you need to implement and use PeopleSoft applications.

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Related documentation.
- Typographical elements and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

---

**Note.** PeopleBooks document only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line. Elements that are common to all PeopleSoft applications are defined in this preface.

---

## PeopleSoft Application Prerequisites

To benefit fully from the information that is covered in these books, you should have a basic understanding of how to use PeopleSoft applications.

See *Using PeopleSoft Applications*.

You might also want to complete at least one PeopleSoft introductory training course.

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft windows, menus, and pages. You should also be comfortable using the World Wide Web and the Microsoft Windows or Windows NT graphical user interface.

These books do not review navigation and other basics. They present the information that you need to use the system and implement your PeopleSoft applications most effectively.

---

## PeopleSoft Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft database. However, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Each PeopleSoft product line has its own version of this documentation.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across a 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 this central PeopleBook. It is the starting point for fundamentals, such as setting up control tables and administering security.

---

## Related Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

## Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on the PeopleSoft Customer Connection web site. Through the Documentation section of PeopleSoft Customer Connection, you can download files to add to your PeopleBook Library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM.

---

**Important!** Before you upgrade, you must check PeopleSoft Customer Connection for updates to the upgrade instructions. PeopleSoft continually posts updates as the upgrade process is refined.

---

### See Also

PeopleSoft Customer Connection web site, <http://www.peoplesoft.com/corp/en/login.asp>

## Ordering Printed Documentation

You can order printed, bound volumes of the complete PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM. PeopleSoft makes printed documentation available for each major release shortly after the software is shipped. Customers and partners can order printed PeopleSoft documentation by using any of these methods:

- Web
- Telephone
- Email

### Web

From the Documentation section of the PeopleSoft Customer Connection web site, access the PeopleSoft Press web site under the Ordering PeopleBooks topic. The PeopleSoft Press web site is a joint venture between PeopleSoft and Consolidated Publications Incorporated (CPI), the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

## Telephone

Contact CPI at 800 888 3559.

## Email

Send email to CPI at [psoftpress@cc.larwood.com](mailto:psoftpress@cc.larwood.com).

## See Also

PeopleSoft Customer Connection web site, <http://www.peoplesoft.com/corp/en/login.asp>

# Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.

## Typographical Conventions

The following table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
<b>Bold</b>	Indicates PeopleCode function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
<i>Italics</i>	Indicates 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.  We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number <i>0</i> , not the letter <i>O</i> .
<b>KEY+KEY</b>	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 <b>ALT+W</b> , hold down the <b>ALT</b> key while you press <b>W</b> .
<b>Monospace font</b>	Indicates a PeopleCode program or other code example.
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.

Typographical Convention or Visual Cue	Description
... (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (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)	<p>When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object.</p> <p>Ampersands also precede all PeopleCode variables.</p>
(ISO)	<p>Information that applies to a specific country, to the U.S. federal government, or to the education and government market, is preceded by a three-letter code in parentheses.</p> <p>The code for the U.S. federal government is USF; the code for education and government is E&amp;G, and the country codes from the International Standards Organization are used for specific countries. Here is an example:</p> <p>(GER) If you're administering German employees, German law requires you to indicate special nationality and citizenship information for German workers using nationality codes established by the German DEUEV Directive.</p>
Cross-references	PeopleBooks provide cross-references either below the heading "See Also" or on a separate line preceded by the word <i>See</i> . Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

## Visual Cues

PeopleBooks contain the following visual cues.

### Notes

Notes indicate information that you should pay particular attention to as you work with the PeopleSoft system.

---

**Note.** Example of a note.

---

A note that is preceded by *Important!* is crucial and includes information that concerns what you must do for the system to function properly.

---

**Important!** Example of an important note.

---

## Warnings

Warnings indicate crucial configuration considerations. Pay close attention to warning messages.

---

**Warning!** Example of a warning.

---

---

## Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about PeopleBooks and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft Product Documentation Manager PeopleSoft, Inc. 4460 Hacienda Drive Pleasanton, CA 94588

Or send email comments to [doc@peoplesoft.com](mailto:doc@peoplesoft.com).

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

---

## Common Elements in These PeopleBooks

<b>As of Date</b>	The last date for which a report or process includes data.
<b>Business Unit</b>	An ID that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.
<b>Description</b>	Enter up to 30 characters of text.
<b>Effective Date</b>	The date on which a table row becomes effective; the date that an action begins. For example, to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.
<b>Once, Always, and Don't Run</b>	Select Once to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run.  Select Always to run the request every time the batch process runs.  Select Don't Run to ignore the request when the batch process runs.
<b>Report Manager</b>	Click to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).

<b>Process Monitor</b>	Click to access the Process List page, where you can view the status of submitted process requests.
<b>Run</b>	Click to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.
<b>Request ID</b>	An ID that represents a set of selection criteria for a report or process.
<b>User ID</b>	An ID that represents the person who generates a transaction.
<b>SetID</b>	An ID that represents a set of control table information, or TableSets. TableSets enable you to share control table information and processing options among business units. The goal is to minimize redundant data and system maintenance tasks. When you assign a setID to a record group in a business unit, you indicate that all of the tables in the record group are shared between that business unit and any other business unit that also assigns that setID to that record group. For example, you can define a group of common job codes that are shared between several business units. Each business unit that shares the job codes is assigned the same setID for that record group.
<b>Short Description</b>	Enter up to 15 characters of text.

## See Also

*Using PeopleSoft Applications*

*PeopleSoft Process Scheduler*

# PeopleSoft Proposal Management Preface

This preface discusses:

- PeopleSoft application fundamentals.
- Common elements in this PeopleBook.
- Pages with deferred processing.

---

**Note.** This PeopleBook documents only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then it either requires no additional explanation or is documented with the common elements for the section, chapter, or PeopleBook.

---

## Application Fundamentals

The *PeopleSoft Proposal Management 8.8 PeopleBook* provides you with implementation and processing information for your PeopleSoft Proposal Management system. However, additional, essential information describing the setup and design of your system resides in companion documentation. The companion documentation consists of important topics that apply to many or all PeopleSoft applications across the Financials, Enterprise Service Automation, and Manufacturing product lines. You should be familiar with the contents of these PeopleBooks.

The following companion PeopleBooks also apply to PeopleSoft Proposal Management.

- *PeopleSoft Application Fundamentals for FMS, ESA, and SCM 8.8 PeopleBook*
- *PeopleSoft Global Options and Reports 8.8 PeopleBook*
- *PeopleSoft Working With Customers and Orders 8.8 PeopleBook*
- *PeopleSoft Working With Third Party Applications 8.8 PeopleBook*

---

## Pages With Deferred Processing

Most pages in PeopleSoft Proposal Management operate in deferred processing mode. Most fields on these pages are not updated or validated until you save the page or refresh it by clicking a button, link, or tab. This delayed processing has various implications for the field values on the page—for example, if a field contains a default value, any value you enter before the system updates the page overrides the default. Another implication is that the system updates quantity balances or totals only when you save or otherwise refresh the page.

### See Also

*PeopleTools PeopleBook: PeopleSoft Application Designer, "Guidelines for Designing Pages"*

---

## Common Elements Used in This PeopleBook

<b>Account</b>	ChartField that identifies the nature of a transaction for corporate accounts.
<b>Activity</b>	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.
<b>Analysis Type</b>	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).
<b>Currency</b>	Code that identifies the type of currency for an amount, such as USD (United States Dollar) or EUR (Euro).
<b>Dept</b> (department)	ChartField that indicates who is responsible for or affected by the transaction.
<b>Effective Date</b>	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.
<b>EIP</b> (enterprise integration point)	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.
<b>Oper Unit</b> (operating unit)	ChartField that is used to identify a location, such as a distribution warehouse or sales center.
<b>Process Monitor</b>	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.
<b>Product</b>	ChartField that captures additional information useful for profitability and cash flow analysis by product sold or manufactured.
<b>Program</b>	ChartField that identifies groups of related activities, cost centers, revenue centers, responsibility centers, and programs. Tracks revenue and expenditures for programs.
<b>Project</b>	The highest level of hierarchical organization within PeopleSoft Project Costing. Projects provide the structure to which activities and resources are added. Each node on a projects tree represents a project. This provides a hierarchical relationship between projects and facilitates cost roll-ups.  A project in PeopleSoft Proposal Management is a subset of a proposal; proposals may contain or entail multiple projects.

<b>Proposal</b>	A comprehensive estimate that contains projects, activities, resources, time and expense projections, and schedule information for a specific customer or internal client. A proposal can contain multiple versions for modeling different scenarios prior to finalizing and submitting one version for approval.
<b>Proposal ID</b>	A unique number that is assigned by the PeopleSoft Contracts system to track the proposal throughout the proposal development and Contract Generation process. This 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 will have the same ID.
<b>Report ID</b>	The report identifier.
<b>Resource Transaction</b>	An individual cost line within PeopleSoft Project Costing. It is through resource transactions that individual costs and types of costs are tracked. Each resource transaction contains a cost and a quantity and as many identifiers of that cost as necessary.
	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.
<b>Resource Type</b>	The Resource Transaction field in PeopleSoft Project Costing that identifies the resource associated with a given cost. Resource types may be very general or very specific depending on your needs; they are used in conjunction with resource categories, resource subcategories, and resource groups.
<b>Run</b>	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.
<b>Run Control ID</b>	Code that identifies the run parameters for a report or process.
<b>SetID</b>	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.
<b>Status</b>	Indicates whether a row in a table is active or inactive. You cannot display inactive rows on transaction pages or use them for running batch processes. Inactivate rather than delete data you no longer use in order to maintain an audit trail.
	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> .
<b>Version</b>	To track different scenarios, PeopleSoft supports multiple versions of proposals. Note however that users can select only one version (the current version) for approval and 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 and expense details for the projects and activities that they want to associate with the proposal.



# CHAPTER 1

## Getting Started With PeopleSoft Proposal Management

This chapter provides an overview of PeopleSoft Proposal Management and discusses:

- PeopleSoft Proposal Management overview.
- PeopleSoft Proposal Management business processes.
- PeopleSoft Proposal Management integrations.
- PeopleSoft Proposal Management implementation.

---

### 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.

You can use PeopleSoft Proposal Management to easily generate multiple proposal versions to find the situation that best fits your business needs. Once a proposal is sold or finalized, you can use the data that you have already entered for that proposal to seamlessly create contracts and projects in PeopleSoft Contracts and PeopleSoft Project Costing.

In PeopleSoft Proposal Management, proposals are typically utilized by professional services organizations to estimate what is going to be required to pursue an initiative or potential service contract that has not yet been accepted.

With PeopleSoft Proposal Management, you have the ability to create and edit proposals, copy proposals, customize rates, view all current proposals, configure a list to view only selected proposals, view overall proposal cost and billing information, and store and view relevant files such as requests for proposals and terms and conditions.

For each proposal, there may be 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 very 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.

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

## Proposal Management Center

To make navigation to the various implementation and business process pages in PeopleSoft Proposal Management, Contracts and Project Costing easier and more convenient, PeopleSoft developed the Proposal Management Center page.

Proposal Management Home page

The Proposal Management Center page provides an alternate method for navigating to the pages used for setting up the system and initiating business processes. Access to the pages in PeopleSoft Proposal Management and the other PeopleSoft applications is also available through the standard menu structure.

The pages included in both menu structures behave identically. The Proposal Management Center page, however, groups links to the pages by business process and provides access to secondary pages from the main links.

---

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

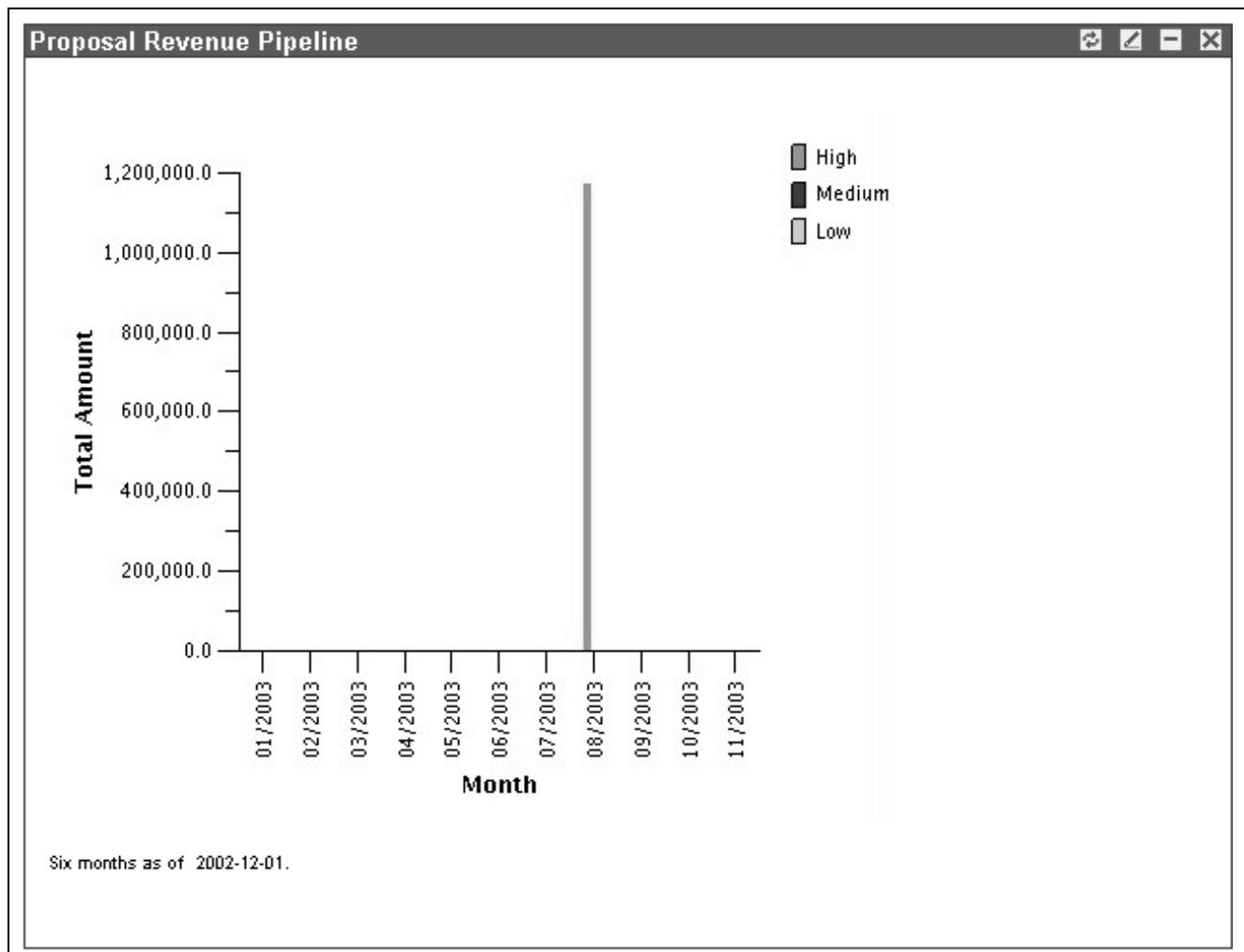
---

## Embedded Analytics

To provide you with a quick look into your proposal revenue stream and the demand sold and unsold proposals may have on your resources, PeopleSoft provides two analytics:

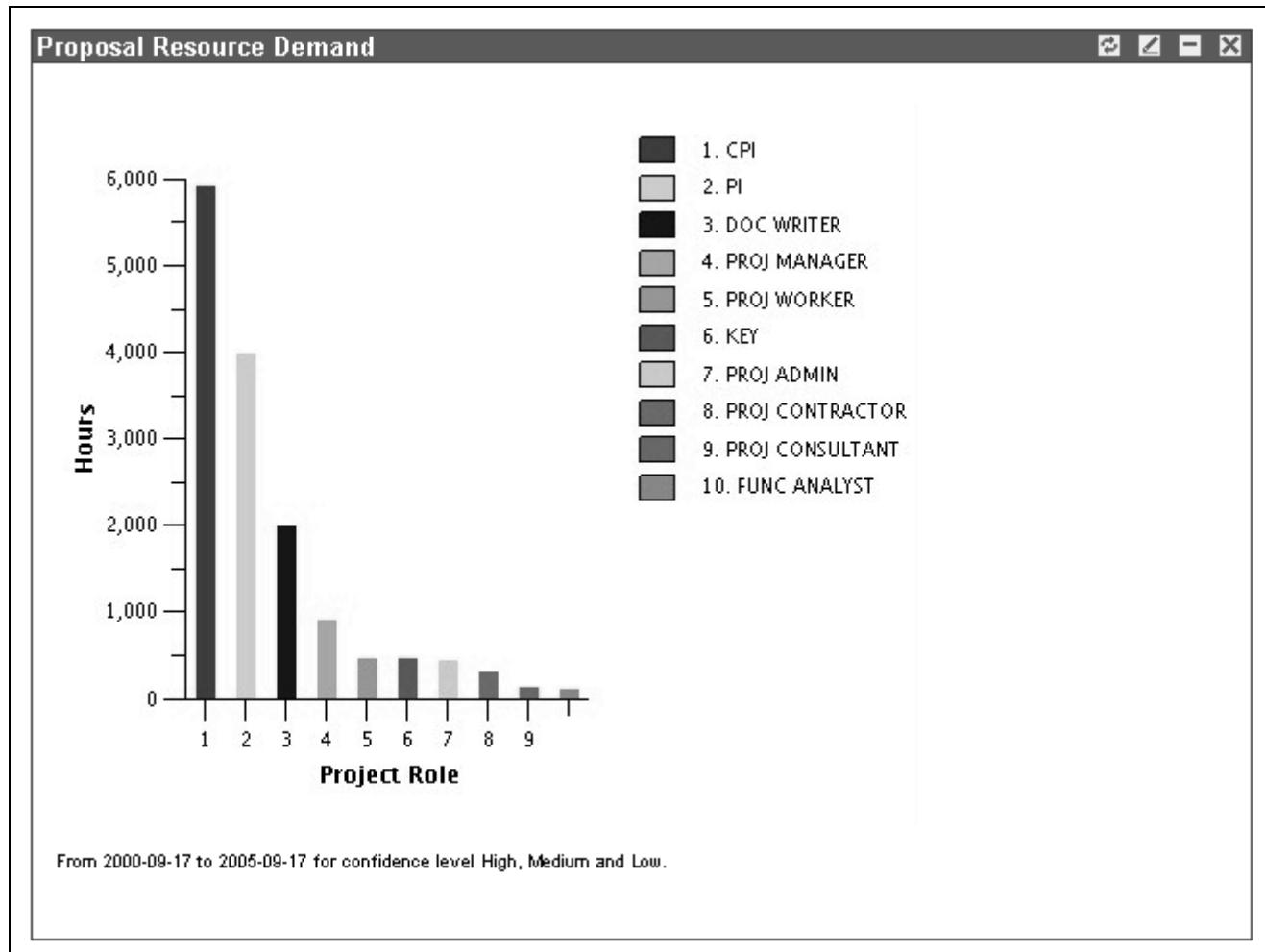
- Proposal Revenue Pipeline
- Proposal Resource Demand

Each analytic has a personalization page that enables you to enter criteria that the system uses to filter and display data on the corresponding pagelets.



Proposal Revenue Pipeline analytic

The Proposal Revenue Pipeline analytic shows revenue information for future periods by confidence threshold as delineated by the user. It uses the criteria entered on the Personalization page to select proposal data and display revenue for the given time period. The graph indicates total revenue amounts by confidence level for future time periods in months. The system displays data for a maximum of 6 months. Information contained in this pagelet can help you make more informed decisions regarding the revenue-related opportunities that your organization may want to pursue.



Proposal Resource Demand pagelet

Use the information generated by this analytic to learn what the demand for resources will be in a future time period. The Proposal Resource Demand analytic shows the number of days demanded for each role if all the proposals in the system meeting the confidence level criteria set by the user are sold and executed. The system displays a maximum of 10 project roles, generates a unique color for each job role, and displays a legend at the top of the page. Information contained in this pagelet can help you make more informed hiring and training decisions.

## Proposal Operational Summary

In addition to the Proposal Revenue Pipeline and Proposal Resource Demand analytics that are delivered with PeopleSoft Proposal Management, PeopleSoft makes the Proposal Operational Summary pagelet available through its PeopleSoft Financials Portal Pack.

Proposal Operational Summary									
Proposal	Description	Customer	Status	Proposal Target	Time Overall Margin	Expense Overall Margin	Total Proposed Amount	Currency	Confidence
CON00000000000016	Software Implementation	Balmoral Wholesalers	Draft	10/11/2003	40.95		183,900.00	USD	80%

As of 2003-10-03.

Proposal Operational Summary pagelet

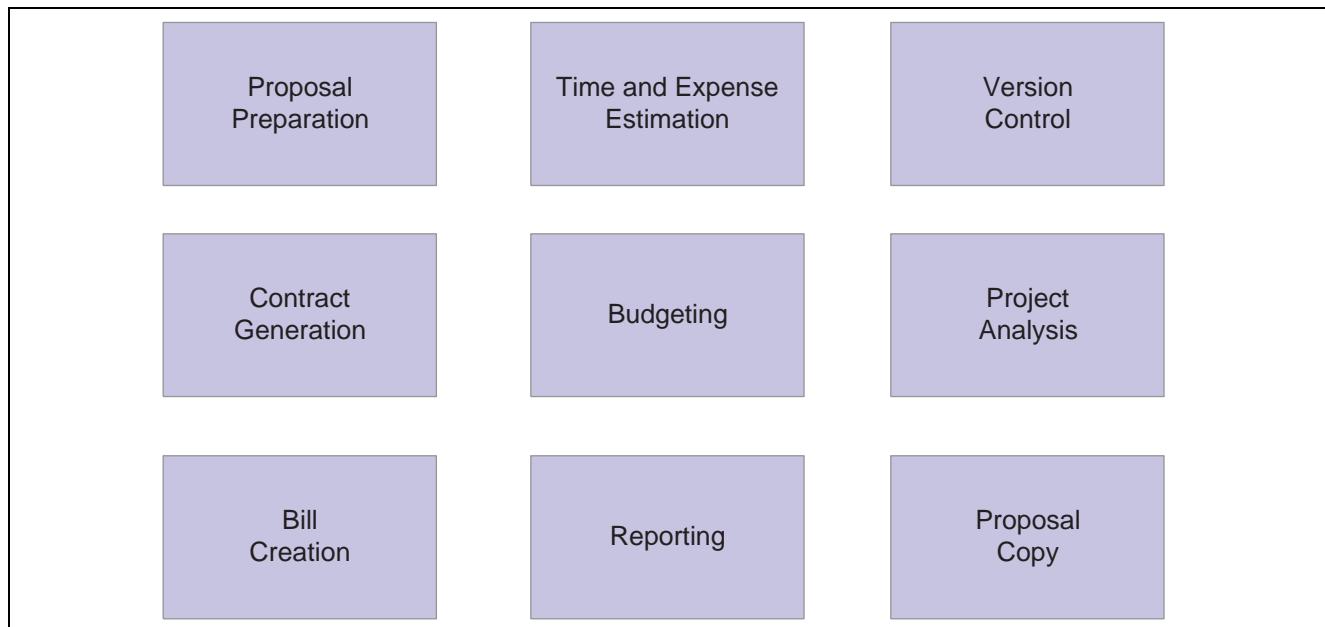
This pagelet displays proposal information based on user-entered criteria. For each proposal you can view a description of the proposal, the customer associated with the proposal, the proposal status, the date the proposal is targeted for completion, the margin percentage for both time and expenses, the total budgeted amount, and the confidence level.

## See Also

*PeopleSoft Financials Portal Pack 8.8 and Enterprise Service Automation Portal Pack 8.8 PeopleBook, “Using Pagelets Enabled by PeopleSoft Proposal Management”*

# PeopleSoft Proposal Management Business Processes

The following graphic lists the PeopleSoft Proposal Management business processes:



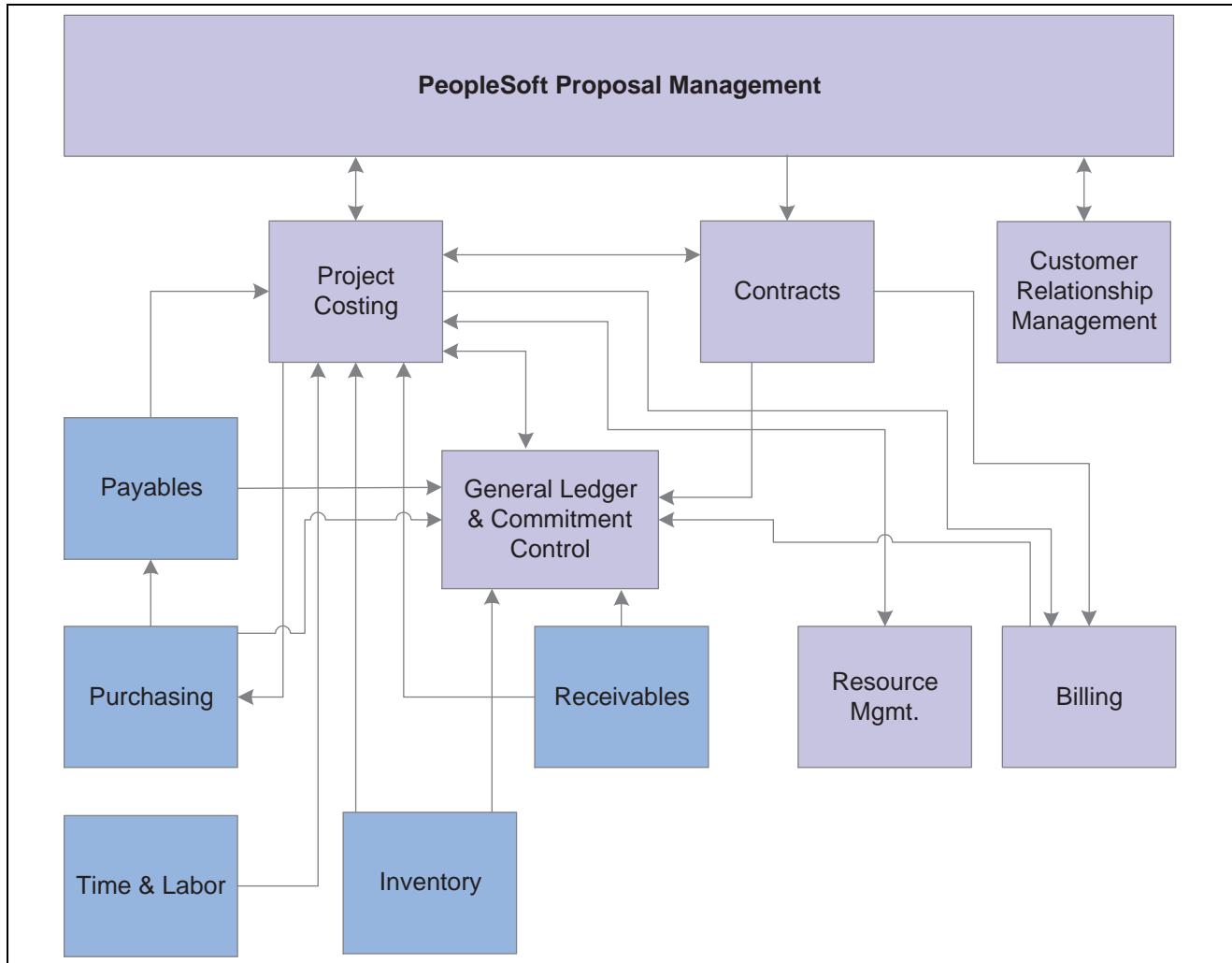
PeopleSoft Proposal Management business processes

We discuss these business processes in the business process and integration chapters in this PeopleBook.

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

## PeopleSoft Proposal Management Integrations

PeopleSoft Proposal Management integrates with the following PeopleSoft applications:



PeopleSoft Proposal Management integration flow with other PeopleSoft applications

We discuss integration considerations in the implementation chapters in this PeopleBook.

Supplemental information about third-party application integrations is located on the PeopleSoft Customer Connection 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 PeopleBook documentation.

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

- Projects
- Contracts
- 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 <i>PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook</i> , “Defining and Using ChartFields,” Adding Account Values.
Alternate Account (ALTACCT)	ALTACCT_CF	See <i>PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook</i> , “Using Alternate Account”.
Bank Branch Information (BANK_BRANCHPNL)	TR_BANK_BRANCH_CI	See <i>PeopleSoft Banks Setup and Processing 8.8 PeopleBook</i> , “Setting Up Banks and Counterparties”.
Budget Reference (BUDREF_PNL)	BUDGET_REF	See <i>PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook</i> , “Defining and Using ChartFields,” Adding Budget Reference Values.

Component	Component Interface	Reference
Chartfield 1 (CHARTFIELD1)	CHARTFIELD1	See <i>PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook</i> , “Defining and Using ChartFields,” Adding Values for Expansion ChartFields 1, 2, and 3.
Chartfield 2 (CHARTFIELD2)	CHARTFIELD2	See <i>PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook</i> , “Defining and Using ChartFields,” Adding Values for Expansion ChartFields 1, 2, and 3.
Chartfield 3 (CHARTFIELD3)	CHARTFIELD3	See <i>PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook</i> , “Defining and Using ChartFields,” Adding Values for Expansion ChartFields 1, 2, and 3.
Class Field (CLASS_PNL)	CLASS_CF	See <i>PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook</i> , “Defining and Using ChartFields,” Adding Class Field Values.
Contact Info (CONTACT_INFO)	CONTACT	See <i>PeopleSoft Working with Customers and Orders 8.8 PeopleBook</i> , “Maintaining Contacts,” Setting Up Contacts.
Customer Group Table (CUST_GROUP_TBL)	CUSTOMER_GROUP	See <i>PeopleSoft Working with Customers and Orders 8.8 PeopleBook</i> , “Maintaining Additional Customer Information,” Establishing Customer Group Tables.
Department (DEPARTMENT)	DEPT_CF	See <i>PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook</i> , “Defining and Using ChartFields,” Adding Department Values.

Component	Component Interface	Reference
Fund Code (FUND_DEFINITION)	FUND_CF	See <i>PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook</i> , “Defining and Using ChartFields,” Adding Fund Code Values.
General Information (CUSTOMER_GENERAL)	CUSTOMER_MAIN_CI CUSTOMER_BILLTO_CI CUSTOMER_SOLDTO_CI CUSTOMER_SHIPTO_CI CUSTOMER_MISC_CI	See <i>PeopleSoft Working with Customers and Orders 8.8 PeopleBook</i> , “Maintaining General Customer Information,” Adding General Customer Information.
InterUnit Pair Maintenance (IU_INTER_PR_BASIC)	IU_INTER_PR_BASIC	See <i>PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook</i> , “Using Interunit and Intraunit Accounting and ChartField Inheritance,” Interunit Pairs.
InterUnit Template (IU_INTER_TMPLT)	IU_INTER_TMPLT	See <i>PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook</i> , “Using Interunit and Intraunit Accounting and ChartField Inheritance,” Defining Interunit Templates.
IntraUnit Template (IU_INTRA_TMPLT)	IU_INTRA_TMPLT	See <i>PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook</i> , “Using Interunit and Intraunit Accounting and ChartField Inheritance,” Defining Intraunit Templates.
Ledgers for a Unit (BUSINESS_UNIT_LED)	EM_BUS_UNIT_LED	See <i>PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook</i> , “Setting Up Ledgers,” Defining Ledgers for a Business Unit.

Component	Component Interface	Reference
Operating Unit (OPERATING_UNIT)	OPER_UNIT_CF	See <i>PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook</i> , “Defining and Using ChartFields,” Adding Operating Unit Values.
Product (PRODUCT)	PRODUCT_CF	See <i>PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook</i> , “Defining and Using ChartFields,” Adding Product Values.
Program Code (PROGRAM_DEFINTION)	PROGRAM_CF	See <i>PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook</i> , “Defining and Using ChartFields,” Adding Program Code Values.
Project ID (PROJECT)	PROJECT_CF	See <i>PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook</i> , “Defining and Using ChartFields,” Adding Project Values.
Scenario (BD_SCENARIO)	BUDGET_SCENARIO	See <i>PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook</i> , “Defining and Using ChartFields,” Adding Scenario Values.
Statistics Code (STATISTICS_TBL)	STATISTICS_CODE	See <i>PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook</i> , “Defining and Using ChartFields,” Adding Statistics Code Values.
Support Team Members (TEAM_MEMBER_TABLE)	TEAM_MEMBER_TABLE_CI	See <i>PeopleSoft Working with Customers and Orders 8.8 PeopleBook</i> , “Maintaining Additional Customer Information,” Setting Up Customer Support Personnel.

Component	Component Interface	Reference
Team Member Personal Data (MEMBER_PERSON1)	MEMBER_PERSON1_CI	See <i>PeopleSoft Working with Customers and Orders 8.8 PeopleBook</i> , “Maintaining Additional Customer Information,” Setting Up Customer Support Personnel.
Team Member Types (MEMBER_TYPE_TABLE)	MEMBER_TYPE_TABLE_CI	See <i>PeopleSoft Working with Customers and Orders 8.8 PeopleBook</i> , “Maintaining Additional Customer Information,” Setting Up Customer Support Personnel.
Value Added Tax Code (TAX_CODE_VAT)	TAX_CODE_VAT	See <i>PeopleSoft Global Options and Reports 8.8 PeopleBook</i> , “Working with Value Added Taxes (VAT),” Defining VAT Codes Using the Value Added Tax Code Page.
VAT Accounts by Business Unit (TAX_BU_CODE_VAT)	TAX_BU_CODE_VAT	See <i>PeopleSoft Global Options and Reports 8.8 PeopleBook</i> , “Working with Value Added Taxes (VAT),” Defining VAT Accounts by General Ledger Business Unit (Optional).
Vat Defaults CI Component (VAT_DEF_CI)	VAT_DEF_CI	See <i>PeopleSoft Global Options and Reports 8.8 PeopleBook</i> , “Working with Value Added Taxes (VAT),” Establishing VAT Defaults.
VAT Entity (VAT_ENTITY_ID)	VAT_ENTITY_ID	See <i>PeopleSoft Global Options and Reports 8.8 PeopleBook</i> , “Working with Value Added Taxes (VAT),” Setting Up VAT Entities.
User Preferences (OPR_DEFAULT)	OPR_DEFAULT_FIN	See <i>PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook</i> , “Defining User Preferences,” Defining Cross-Application User Preferences.

## Other Sources of Information

In the implementation planning phase, take advantage of all PeopleSoft sources of information, including the installation guides, data models, business process maps, and troubleshooting guidelines. A complete list of these resources is in the preface of the *PeopleSoft Application Fundamentals for FMS, ESA, and SCM 8.8 PeopleBook*, with information on where to find the most up-to-date version of each.

**See Also**

*PeopleSoft Setup Manager for Financials, Enterprise Service Automation, and Supply Chain Management 8.8 PeopleBook*

*PeopleTools PeopleBook: PeopleSoft Integration Broker*

*PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook*, “PeopleSoft Application Fundamentals PeopleBook Preface”

## CHAPTER 2

# Navigating in PeopleSoft Proposal Management

This chapter discusses how to navigate 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, PeopleSoft provides menu navigation, standard navigation pages, and PeopleSoft Navigator.

---

### See Also

*PeopleTools PeopleBook: Using PeopleSoft Applications*

## 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.

Page Name	Navigation	Usage
Proposal Management Center	Proposal Management, Proposal Management Center	Access the key areas of PeopleSoft Financials to manage your proposals.
Proposal Management	Click the Proposal Management link on the Proposal Management Center page	Create proposals, versions and budgets. Also inquire on existing proposals.
Configuration	Click the Configuration link on the Proposal Management Center page.	Administer the configuration of the Proposal Management module.
Contracts	Click the Contracts link on the Proposal Management Center page.	Enter and manage contracts, including billing and revenue recognition options.
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.

**See Also**

*PeopleSoft Enterprise Components for Financials, Enterprise Service Automation and Supply Chain Management 8.8 PeopleBook, "Working with Navigation Pages," Describing Navigation Pages*

*Using PeopleSoft Applications PeopleBook, "Working with Browser Based Applications," Using Navigation Pages*

*PeopleSoft Enterprise Components for Financials, Enterprise Service Automation and Supply Chain Management 8.8 PeopleBook, "Using Navigation Collections"*

## CHAPTER 3

# Defining Your Operational Structure

This chapter provides overviews of integration templates, business units, products, and installation options and discusses how to define Proposal Management defaults and confidence levels for business units.

## Understanding Integration Templates

PeopleSoft Proposal Management integrates with PeopleSoft Project Costing, Contracts, General Ledger (GL), Billing, Receivables, Payables, and 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 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 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 associated with them, you must first define the integration template that the Project Costing business unit will use. This template tells the system which primary General Ledger business unit will interact with the Project Costing business unit.

---

**Note.** PeopleSoft Proposal Management uses the General Ledger business unit that is designated as the Primary GL BU (primary general ledger business unit) on the GL Integration Detail page. Select Setup Financials/Supply Chain, Product Related, Project Costing, Project Options, Integration Templates, GL Integration Detail.

---

You can find instructions for defining integration templates in the *PeopleSoft Project Costing 8.8 PeopleBook*.

### See Also

*PeopleSoft Project Costing 8.8 PeopleBook*, “Structuring PeopleSoft Project Costing,” Creating Templates for Integration with Other Applications

---

## Understanding Business Units

This section discusses:

- Project Costing business units.
- Contracts business units.

---

**Note.** PeopleSoft recommends that you set up your Project Costing business units before you set up your Contracts business units.

---

## Project Costing Business Units

Because PeopleSoft Proposal Management uses the tables in PeopleSoft Project Costing to store information, you must establish the business units that you plan to use in PeopleSoft Project Costing on both the Project Costing Definition page and the Project Costing Options pages.

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

### See Also

*PeopleSoft Project Costing 8.8 PeopleBook*, “Defining Project Business Units”

[Chapter 3, “Defining Your Operational Structure,” Defining Proposal Management Defaults and Confidence Levels for the Business Units, page 19](#)

## Contracts Business Units

Because business unit selection in PeopleSoft Proposal Management comes from the Contracts Business Unit table, you must first establish any 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 Contract Generation process.

### See Also

*PeopleSoft Contracts 8.8 PeopleBook*, “Defining PeopleSoft Contracts Business Units”

---

## Understanding Products

In PeopleSoft Contracts, a contract must have contract lines to be billed. When you initiate the Contract Generation 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 Contract Generation 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 dollar 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. Then select a revenue method. The system ignores the other fields on the page during the Contract Generation 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. 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 since contract lines bill at the activity level

---

You can find instructions for defining products in the *PeopleSoft Contracts 8.8 PeopleBook* and in the *PeopleSoft Working with Customers and Orders 8.8 PeopleBook*.

### See Also

*PeopleSoft Contracts 8.8 PeopleBook*, “Structuring Contracts,” Defining Products and Product Groups

*PeopleSoft Working with Customers and Orders 8.8 PeopleBook*, “Setting Up Products”

---

## Understanding Installation Options

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

This section discusses:

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

## Overall Options

Use the pages in the Installation component to configure the installation information and to indicate how you want to use certain cross-application features. Use this component to enable or disable PeopleSoft Commitment Control processing for applications, to determine the alternate characters that the system uses for a specific language code, to set specific document management control options that both enable the embedded document management system and also specify system-level configurations, and to enable the use of entry events in PeopleSoft General Ledger, Payables, Purchasing, and Receivables.

---

**Note.** To use Commitment Control for PeopleSoft Proposal Management, you must select the Project Costing check box in the Enable Commitment Control group box on the Installed Products page. If you turn Commitment Control on, you must then select the same ledger groups on the Project Business Unit Setup page in PeopleSoft Proposal Management that you have set up in Commitment Control. When you initiate the Contract Generation process for a proposal in PeopleSoft Proposal Management, the system sends budget information to Commitment Control. If Commitment Control is turned off, the system ignores Commitment Control when you initiate the Contract Generation process.

---

You can find instructions for defining overall options in the *PeopleSoft Application Fundamentals for FMS, ESA, and SCM 8.8 PeopleBook*.

### See Also

*PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook*, “Setting Installation Options for PeopleSoft Applications,” Setting Up Cross-Application Installation Options

## Application-Specific Installation Options

Because PeopleSoft Project Costing is the vehicle by which most transactions are processed through the system, you need a way to identify these transactions as they come in from the various feeder systems. Use the Project 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, it is recommended that you do 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 Billing - General Options page and the Billing - GL/AR Options page to define installation options specific to PeopleSoft Billing.

You can find instructions for setting application-specific installation options in the *PeopleSoft Application Fundamentals for FMS, ESA, and SCM 8.8 PeopleBook*.

## See Also

*PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook*, “Setting Installation Options for PeopleSoft Applications,” Setting Up Application-Specific Installation Options

## 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 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 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 8.8 PeopleBook*.

## See Also

*PeopleSoft Project Costing 8.8 PeopleBook*, “Defining Project Business Units,” Setting Up the Project Delete Utility Delete Parameters

---

# Defining Proposal Management Defaults and Confidence Levels for the Business Units

Because the system captures transactional data in PeopleSoft Project Costing, you must define the Project Costing business units in both PeopleSoft Project Costing and PeopleSoft Proposal Management. The Project Costing business unit setup pages provide default values in PeopleSoft Project Costing when a user runs the Contract Generation 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 Contracts business unit setup pages during the Contract Generation 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 or approved, 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 appears to the right of the Confidence Pct 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.

This section discusses how to:

- Define Proposal Management defaults for the Project Costing business unit.
- Define Proposal Management defaults for the 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 Proposal Management Defaults and Confidence Levels for the Business Units

Page Name	Object 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 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.

## Defining Proposal Management Defaults for the Project Costing Business Unit

Access the Projects BU page.

## Projects BU

<b>Projects Business Unit:</b>	CAN01	CANADA OPERATIONS
<b>*Integration</b>	<input type="text" value="CANADA"/>	<b>General Ledger BU</b> CAN01
<b>Ledger Group:</b>	<input type="text" value="RECORDING"/>	
<b>Ledger:</b>	<input type="text" value="CORPORATE"/>	

\* Required Fields

Projects BU page

**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. Ledger groups fields, however, are required

#### Integration Template

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 use when posting expense and revenue transactions to the general ledger from the business unit.

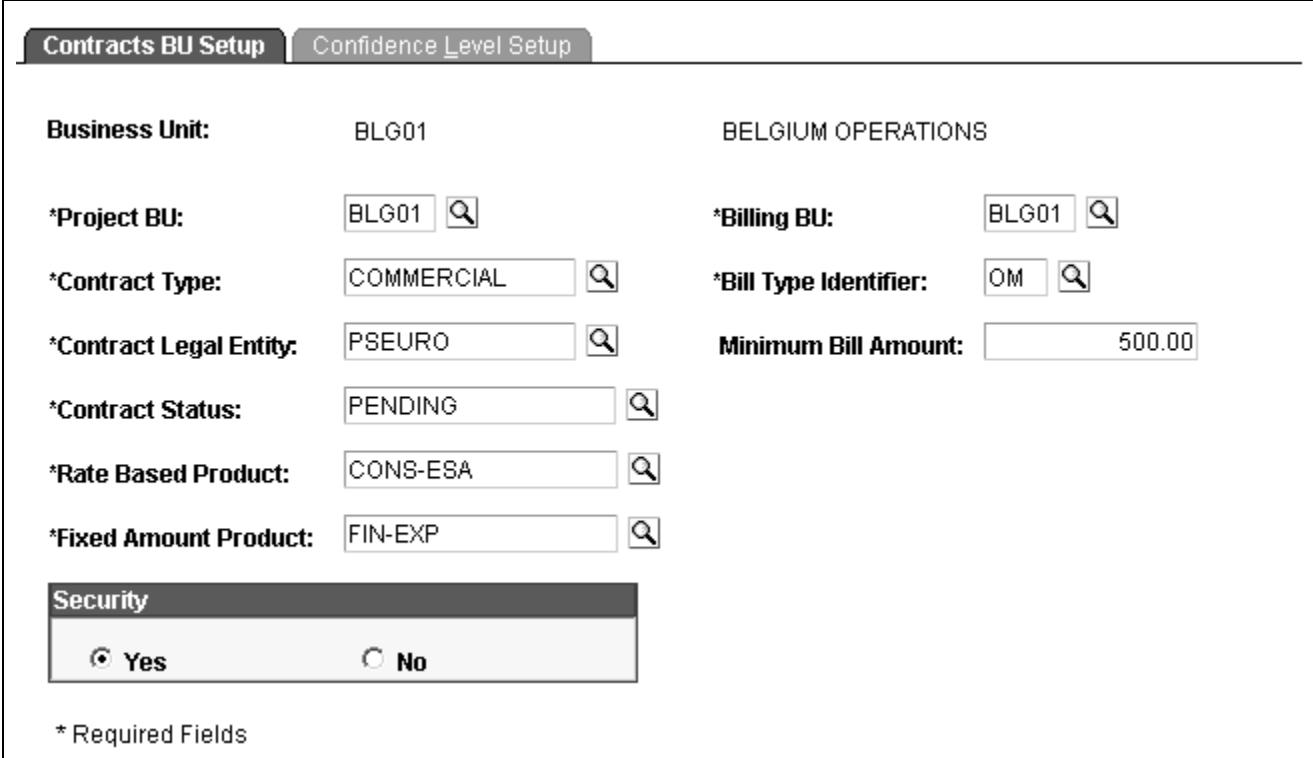
#### See Also

*PeopleSoft Project Costing 8.8 PeopleBook*, “Structuring PeopleSoft Project Costing,” Creating Templates for Integration with Other Applications

*PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook*, “Setting Up Ledgers”

## Defining Contracts Business Unit Defaults for PeopleSoft Proposal Management

Access the Contracts BU Setup page.



The screenshot shows the 'Contracts BU Setup' page. At the top, there are two tabs: 'Contracts BU Setup' (which is selected) and 'Confidence Level Setup'. The page contains several input fields for defining business unit defaults:

<b>Business Unit:</b>	BLG01	BELGIUM OPERATIONS
<b>*Project BU:</b>	BLG01 <input type="button" value="🔍"/>	<b>*Billing BU:</b> BLG01 <input type="button" value="🔍"/>
<b>*Contract Type:</b>	COMMERCIAL <input type="button" value="🔍"/>	<b>*Bill Type Identifier:</b> OM <input type="button" value="🔍"/>
<b>*Contract Legal Entity:</b>	PSEURO <input type="button" value="🔍"/>	<b>Minimum Bill Amount:</b> 500.00
<b>*Contract Status:</b>	PENDING <input type="button" value="🔍"/>	
<b>*Rate Based Product:</b>	CONS-ESA <input type="button" value="🔍"/>	
<b>*Fixed Amount Product:</b>	FIN-EXP <input type="button" value="🔍"/>	
<b>Security</b> <input checked="" type="radio"/> Yes <input type="radio"/> No		

\* Required Fields

Contracts BU Setup page

<b>Project BU</b> (projects business unit)	Select the Project Costing business unit in which you want to store your projects-related information.
<b>Billing BU</b> (billing business unit)	Select the business unit that you want to use for billing. This field is a default for contracts 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 PeopleSoft General Ledger business unit as the PeopleSoft Contracts business unit.
<b>Contract Type</b>	Select a value to categorize your contracts for reporting purposes.
<b>Bill Type Identifier</b>	Select a bill type. This field is a default for contracts created under the business unit. The bill type represents a category of activity being billed.
<b>Contract Legal Entity</b>	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.
<b>Minimum Bill Amount</b>	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 product 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.

**See Also**

*PeopleSoft Contracts 8.8 PeopleBook*, “Structuring Contracts,” Defining Contract Types

*PeopleSoft Contracts 8.8 PeopleBook*, “Structuring Contracts,” Defining Legal Entities

*PeopleSoft Contracts 8.8 PeopleBook*, “Structuring Contracts,” Defining Contract Statuses

*PeopleSoft Billing 8.8 PeopleBook*, “Establishing PeopleSoft Billing Business Units”

*PeopleSoft Contracts 8.8 PeopleBook*, “Structuring Contracts,” Defining Products and Product Groups

## Defining Confidence Levels for PeopleSoft Proposal Management

Access the Confidence Level Setup page.

Contracts BU Setup		Confidence Level Setup	
<b>Business Unit:</b> BLG01			
<b>Low Confidence</b>			
<b>Percent From:</b>	0	<b>Percent To:</b>	65
<b>Medium Confidence</b>			
<b>Percent From:</b>	66	<b>Percent To:</b>	80
<b>High Confidence</b>			
<b>Percent From:</b>	81	<b>Percent To:</b>	100

Confidence Level Setup page

**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

# PeopleSoft Proposal Management Security

This chapter provides an overview of PeopleSoft Proposal Management security.

---

## 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 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 get access to a proposal if these conditions are met:

1. Their user ID has an employee ID associated with it.
2. They have used their employee ID to initiate the proposal or any one of its projects.

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

## Security by Department and User ID

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 need 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 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, 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 PeopleSoft delivers 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:

Menu Navigation	Component	Search Record
Proposal Management, Proposal and Version, Maintain Proposal	GM_OPPTY_HDR	GM_OPTY_SRCH_VW
Proposal Management, Proposal and Version, Copy Proposal	GM_BUD_PPSL_CPY	GM_PROP_SRCH

In addition, the system also uses these department-level security views as prompt tables to limit the proposals that are available for printing.



## CHAPTER 5

# Structuring PeopleSoft Proposal Management

This chapter provides an overview of structuring PeopleSoft Proposal Management and discusses how to establish proposal management information.

---

## Understanding PeopleSoft Proposal Management Structure

This section discusses:

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

### See Also

*PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook*, “Defining Financials and Supply Chain Management Common Definitions”

## Customer Information

To add new customers to the database, enter the required information in the General Information component. To initiate a number-sequencing scheme, access the Automatic Numbering page and set the automatic numbering options.

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.

### See Also

*PeopleSoft Working with Customers and Orders 8.8 PeopleBook*, “Maintaining General Customer Information”

*PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook*, “Defining Financials and Supply Chain Management Common Definitions,” Defining Additional Common Information

*PeopleSoft Working with Customers and Orders 8.8 PeopleBook*, “Maintaining Additional Customer Information,” Using Quick Customer Create

## Proposal Contacts

In PeopleSoft Financials the personnel in your organization who are involved in customer support are called team members. To add proposal contacts to PeopleSoft Proposal Management, you must set up each team member as a sales person on the Team Member Personal Data pages. You can then assemble members into teams and associate teams with customers, quotes, and sales orders.

### See Also

*PeopleSoft Working with Customers and Orders 8.8 PeopleBook*, “Maintaining Additional Customer Information,” Setting Up Customer Support Personnel

## Project Roles and Rates

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

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

### See Also

*PeopleSoft Project Costing 8.8 PeopleBook*, “Pricing Project Costs,” Understanding and Defining Rate Templates

*PeopleSoft Project Costing 8.8 PeopleBook*, “Securing Data in PeopleSoft Project Costing”

*PeopleSoft Project Costing 8.8 PeopleBook*, “Structuring PeopleSoft Project Costing”

*PeopleSoft Project Costing 8.8 PeopleBook*, “Pricing Project Costs,” Understanding and Defining Rate Templates

## 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.

Any data that you enter or modify on the Personal Data page, however, is not reflected in the human resources system and is subject to override.

To add new proposal planners to the system, use the Personal Data (Edit) page (select Setup Financials/Supply Chain, Common Definitions, Employee Data, Create/Update Personal Data).

### See Also

*PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook*, “Defining Financials and Supply Chain Management Common Definitions,” Defining Additional Common Information

## Establishing Proposal Management Information

To establish proposal management information, use the Activity Type (GM\_ACT\_TYPE\_PM), Budget Items (GM\_PM\_BUD\_ITEMS), Budget Category Type (GM\_BUD\_CAT\_TYPE), and Proposal Key Words (GM\_PROP\_CTR\_KEYWOD) components.

This section discusses how to:

- Create activity ID templates.
- Create budget item types.
- Create budget items.
- Create keywords.

## Pages Used to Establish Proposal Management Information

Page Name	Object 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 Item Types	GM_BUD_CAT_TYPE	Set Up Financials/Supply Chain, Product Related, Proposal Management, Budget Item Types	Create budget item types.
Budget Items	GM_BUD_ITEMS	Set Up Financials/Supply Chain, Product Related, Proposal Management, Budget Items	Create budget items. Entering values on this page provides the prompts for the Budget Item field on the Proposal Expense Estimate 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

## Creating Activity ID Templates

Access the Activities page.

**Activities**

SetID: SHARE	Activity ID: CONSULTATION															
<b>Detail</b> <table border="1"> <tr> <td>*Effective Date:</td> <td>08/23/2002</td> <td>*Status:</td> <td>Active</td> <td>+ -</td> </tr> <tr> <td>Short Description:</td> <td>CONS</td> <td colspan="3"></td> </tr> <tr> <td>*Description:</td> <td>Consultation</td> <td colspan="3"></td> </tr> </table>		*Effective Date:	08/23/2002	*Status:	Active	+ -	Short Description:	CONS				*Description:	Consultation			
*Effective Date:	08/23/2002	*Status:	Active	+ -												
Short Description:	CONS															
*Description:	Consultation															

Activities page

Activity ID templates are labels that identify and group activities to facilitate analysis and reporting on similar activities across all projects. The activities that you enter on this page are available for selection on both the Time Estimate and Expense Estimate pages in PeopleSoft Proposal Management. To add activities to the system, select an effective date and status and then enter descriptions for the activity.

## Creating Budget Item Types

Access the Budget Item Types page.

**Budget Item Types**

SetID: SHARE	Item Type: XPNS															
<b>Budget Item Type</b> <table border="1"> <tr> <td colspan="2">Find   View All</td> <td>First</td> <td>1 of 1</td> <td>Last</td> </tr> <tr> <td>*Effective Date:</td> <td>01/01/1900</td> <td>*Status:</td> <td>Active</td> <td>+ -</td> </tr> <tr> <td>*Description:</td> <td>Expenses - Proposal Management</td> <td colspan="3">Map Modular <input type="checkbox"/></td> </tr> </table>		Find   View All		First	1 of 1	Last	*Effective Date:	01/01/1900	*Status:	Active	+ -	*Description:	Expenses - Proposal Management	Map Modular <input type="checkbox"/>		
Find   View All		First	1 of 1	Last												
*Effective Date:	01/01/1900	*Status:	Active	+ -												
*Description:	Expenses - Proposal Management	Map Modular <input type="checkbox"/>														

Budget Item Types page

Budget item types are labels that identify and group expense details to facilitate analysis and reporting. To add budget item types to the system, select an effective date and status and then enter a description for the item type.

PeopleSoft delivers the following budget item types for Proposal Management:

Budget Item Type	Description
RSRC	Resources - Proposal Management
XPNS	Expenses - Proposal Management

## Creating Budget Items

Access the Budget Items page.

**Budget Items**

SetID:	SHARE	Budget Item:	SALARY																												
<table border="1"> <thead> <tr> <th colspan="4">Budget Items</th> <th colspan="3">Customize   Find   View All    First  1 of 1  Last</th> </tr> <tr> <th>General</th> <th>Projects</th> <th>GL Chartfields</th> <th></th> <th colspan="3"></th> </tr> <tr> <th>*Effective Date</th> <th>*Effective Status</th> <th>Budget Item Type</th> <th>*Description</th> <th colspan="3">Unit of Measure</th> </tr> </thead> <tbody> <tr> <td>01/01/1900 </td> <td>Active </td> <td>RSRC </td> <td>Time for Proposal Management</td> <td>MHR </td> <td></td> <td></td> </tr> </tbody> </table>				Budget Items				Customize   Find   View All    First  1 of 1  Last			General	Projects	GL Chartfields					*Effective Date	*Effective Status	Budget Item Type	*Description	Unit of Measure			01/01/1900	Active	RSRC	Time for Proposal Management	MHR		
Budget Items				Customize   Find   View All    First  1 of 1  Last																											
General	Projects	GL Chartfields																													
*Effective Date	*Effective Status	Budget Item Type	*Description	Unit of Measure																											
01/01/1900	Active	RSRC	Time for Proposal Management	MHR																											

Budget Items 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 on the Expense Estimate page in PeopleSoft Proposal Management.

### Budget Items - General Tab

**Budget Item Type** Select the budget item type to associate with the budget item that you are creating.

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

**Unit of Measure** Select, if applicable, one of the following time quantities to enforce continuity across a budget:

- *MHR* (hours)
- *MDY* (days)
- *MWK* (weeks)
- *MMO* (months)

### Budget Items - Projects Tab

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

### Budget Items - GL Chartfields Tab

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

## Creating Key Words

Access the Proposal Key Words page.

## Proposal Key Words

<b>SetID:</b>	SHARE	<b>Key Word:</b>	IMPLEMENTATION
<b>Key Word Detail</b>		Find   View All	First  1 of 1
<b>*Effective Date:</b>	09/26/2002	<b>*Status:</b>	Active
<b>*Description:</b>	Implementation		

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 Time Estimate and Expense Estimate pages in PeopleSoft Proposal Management.

---

# CHAPTER 6

## Preparing, Generating, and Viewing Proposal Information

This chapter provides overviews of the proposal preparation process, project teams, and the Contract Generation process and discusses how to:

- Prepare and generate proposal information.
- Configure time defaults, bill options, and security.
- Enter time and expense estimates.
- Use the My Proposals page.
- View customer relationship management (CRM) related information.

---

### Understanding the Proposal Preparation Process

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.

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 time.

From the Maintain Proposal page you can configure the system to calculate time based on your specific business practices. For example, if you configure the system to calculate 10 hour days and you have an hourly rate of 20 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 time estimates.

You can enter a time 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 project role and then calculates the estimated cost and bill amounts as well as margin percentages for the proposal on the Summary page. On the Resources tab on the Time Estimate page you can enter adjustments to the bill rate as either a flat amount, as a percentage, or as a new rate. You can enter the same role multiple times, but they will all have the same bill rate (the latest row rate will overwrite the other rows).

- Enter expense information.

You can enter any anticipated expenses that are associated with the projects and activities on the proposal. You can select from a list of predefined budget items and then enter the quantity and unit cost rate for each item. The system calculates the total estimated expense amount for the proposal on the Summary page

- 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 time and expense information for the particular version of the proposal, you can make adjustments to both the overall time and the overall expense 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 time and expense information, the system calculates the totals for the particular version of the proposal and summarizes the information on the Maintain Proposal page. This 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 or internal approver accepts a version of the proposal, you can change the status of the proposal to *Committed* and then generate data that PeopleSoft Contracts, Project Costing, and Billing use to create invoices and track project-related information.

---

## Understanding Project Teams

This section discusses:

- Project Teams.
- Project Delete Utility.

## Project Teams

Project teams are used in PeopleSoft Project Costing 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 team for the selected version of a proposal by simply selecting the Create Project Team check box on the Time Estimate 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 PeopleSoft 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 Time Estimate 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 team alone in a status of pending for transactional activity, so it is okay to delete these project teams.

---

### See Also

*PeopleSoft Project Costing 8.8 PeopleBook, "Staffing Project and Activity 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 Project Costing structures under that 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 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 to be deleted when you run the Project Delete Utility.

### See Also

*PeopleSoft Project Costing 8.8 PeopleBook, "Defining Project Business Units," Setting Up the Project Delete Utility Delete Parameters*

---

## Understanding Contract Generation

This section discusses:

- Pre-Spending.

- The Contract Generation process.
- Contract general.
- Contract lines.
- Billing plans.
- Revenue recognition plans.
- Projects and activities.
- Rate templates.
- Budget generation.

## Pre-Spending

Sometimes you need to enable spending before a proposal has been formally approved.

When you initiate the Pre-Spending process from the Maintain Proposal page, the system creates the selected projects and activities in PeopleSoft Project Costing. It does not create a contract at this time. The process does, however, store the contract ID and project ID with the proposal to reserve them until you are ready to initiate the Contract Generation process.

When you run the Contract Generation process, the system creates the contract and adds activities with the appropriate dollar amounts. Once you run the Contract Generation process in PeopleSoft Proposal Management for a proposal, you cannot run it again.

## The Contract Generation Process

After the proposal approver changes the status of the proposal to *Committed*, you can generate the proposal into its various revenue and project tracking tables in PeopleSoft Contracts and PeopleSoft Project Costing.

After you run the Contract Generation process, the system automatically updates the 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 PeopleSoft Contracts business unit:

- Contract general.
- Contract lines.
- Billing plan.
- Revenue recognition plans.
- Projects and activities.
- Project teams.
- Rate templates.

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

Defining a contract header is the first step in setting up a new contract. The Contract Generation 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 has been 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 the following attributes:

- Data fields are available for entry only via 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.

### See Also

*PeopleSoft Contracts 8.8 PeopleBook*, “Creating Contracts,” Defining General Contract Information

## Contract Lines

A contract line corresponds to an individual product or service. The Contract Generation 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.

### See Also

*PeopleSoft Contracts 8.8 PeopleBook*, “Structuring Contracts,” Defining Products and Product Groups

*PeopleSoft Contracts 8.8 PeopleBook*, “Creating Contracts,” Defining Contract Lines

## 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 Contract Generation 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 has been assigned to the product ID used on the contract line

---

## See Also

*PeopleSoft Contracts 8.8 PeopleBook*, “Setting Up Billing Plans”

*PeopleSoft Contracts 8.8 PeopleBook*, “Processing PeopleSoft Contracts Billing”

*PeopleSoft Working with Customers and Orders 8.8 PeopleBook*, “Setting Up Products,” Establishing the Product Definition

## 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 Contract Generation 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), 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 has been assigned to the product ID used on the contract line

---

## See Also

*PeopleSoft Contracts 8.8 PeopleBook*, “Setting Up Revenue Plans”

*PeopleSoft Working with Customers and Orders 8.8 PeopleBook*, “Setting Up Products,” Establishing the Product Definition

## Projects and Activities

The Contract Generation 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 Contract Generation 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 Contract Generation process, you can maintain project information, perform project analysis, track procurement costs, create budgets, track expenses, gather time and labor costs, price resources, process allocations, manage investment incentives, and generate operational reports.

### See Also

*PeopleSoft Project Costing 8.8 PeopleBook*, “Creating and Maintaining Projects”

*PeopleSoft Project Costing 8.8 PeopleBook*, “Creating and Maintaining Activities”

## Rate Templates

Each time that you generate a contract through PeopleSoft Proposal Management, the system creates a rate template for each contract line that is created. The rate templates can be a combination of standard billing and cost rates or customized billing rates that have been adjusted on the proposal. If specified, proposal time and expense mark-up and mark-down percentages are also created on the rate templates.

The system tags these rate templates as contract rate templates and associates them with the contract lines for which they were created. This prevents the templates from being used as common project rate templates, as contract rate templates are used only for the contracts with which they are associated.

During the Contract Generation process, the system stamps each activity ID with the created rate template name and the contract line to which it is assigned.

When you run the Contracts/Billing Interface Process (CA\_BI\_INTFC) from PeopleSoft Contracts, the system retrieves rate-based billable transactions rows from the Project Resource table (PROJ\_RESOURCE) in PeopleSoft Project Costing and sends them to PeopleSoft Billing. PeopleSoft Billing then generates invoices for the contract lines and sends information regarding the invoices back to PeopleSoft Contracts and PeopleSoft Project Costing.

Rate templates enable you to define for the system which transaction types should be priced and in which manner. When transactions are fed into PeopleSoft Project Costing, the system calls the pricing engine. The pricing engine is the tool that the system uses to evaluate transactions. It uses the rate template that is assigned to the contract line to match source transaction criteria so that it can create additional transaction rows.

PeopleSoft Contracts uses the rates that are entered in PeopleSoft Proposal Management for the actual billing and costing. PeopleSoft Proposal Management takes the rates that were entered for the proposal and generates unique rate templates. The created rate template can contain standard and customized rates. The pricing engine uses the rate template that is associated with a contract line, and the projects and activities that are attached to the contract line, to generate billing and costing rows in PeopleSoft Project Costing from feeder system source transactions.

Rate templates consist of two parts:

- **Source Criteria**

Defines the criteria that the pricing engine uses to match incoming transactions with a rate template.

- **Target Definition**

Tells the system what to do with the transactions once a match is found. The resulting rows are passed to the Project Resource table.

---

**Note.** For mark-downs, PeopleSoft Proposal Management uses the analysis type of "PMR (Proposal Management Reversal) for target rows in the rate template. The PeopleSoft Project Costing pricing engine creates rows in the Project Resource table with an analysis type of PMR and indicates that the amounts for these rows will be reversed. For PeopleSoft Proposal Management you need to add the PMR analysis type to the ALL, PSWKS, PSLMT and PSBLD analysis groups. For billing purposes, the system selects and processes project resource transactions with the analysis type of PMR.

---

In summary, the rate template enables the pricing engine to turn incoming costs into billable rows. You can find information on rate templates in the *PeopleSoft Project Costing 8.8 PeopleBook*.

### See Also

*PeopleSoft Contracts 8.8 PeopleBook*, "Working with PeopleSoft Project Costing," Understanding the Relationship Between PeopleSoft Contracts and PeopleSoft Project Costing

*PeopleSoft Project Costing 8.8 PeopleBook*, "Pricing Project Costs," Understanding and Defining Rate Templates

*PeopleSoft Project Costing 8.8 PeopleBook*, "Pricing Project Costs"

*PeopleSoft Project Costing 8.8 PeopleBook*, "Integrating with PeopleSoft Contracts and PeopleSoft Billing"

## Budget Generation

When you run the Contract Generation process, the system brings each time and expense detail line on the proposal into the Budget Detail page in PeopleSoft Project Costing as a distinct line.

The system also brings cost and revenue rows associated with each line into PeopleSoft Project Costing as distinct lines.

Mark-up or mark-down amounts appear as single rows per activity on the Budget Detail page. The system displays the total amount of the mark-up or mark-down that is associated with the activity.

For example, if there are three bill rows and a 10 percent markup, the system creates one line for each activity as follows.

### Activity 1

Line 1: 11,600 USD = 40 hours x 290 USD

Line 2: 11,600 USD = 40 hours x 290 USD

Line 3: 2,320 USD = (11,600 USD + 11,600 USD) x .10

### Activity 2

Line 1: 11,600 USD = 40 hours x 290 USD

Line 2: 1,160 USD = (11,600 USD x .10)

### See Also

*PeopleSoft Project Costing 8.8 PeopleBook*, “Budgeting Project Costs and Planning Revenue”

---

## Prerequisites

If you are adding PeopleSoft Proposal Management to an existing suite of PeopleSoft applications, most of the setup procedures, except for activity types and budget items, should already be completed. Activity types and budget items are specific to PeopleSoft Proposal Management.

### See Also

[Chapter 5, “Structuring PeopleSoft Proposal Management,” page 29](#)

---

## Preparing and Generating Proposal Information

This section discusses how to prepare and generate proposal information.

### Page Used to Prepare and Generate Proposal Information

Page Name	Object Name	Navigation	Usage
Maintain Proposal	GM_OPPTY_HDR	Proposal Management, Proposal and Version, Maintain Proposal	Enter general proposal information.

### Entering Proposal Information

Access the Maintain Proposal page.

**Maintain Proposal**

<b>Proposal:</b>	COND0000000000016	<b>*Status:</b>	01 - Draft																																																																						
<b>*Description:</b>	Software Implementation	<b>Confidence Pct:</b>	90																																																																						
<b>*Customer:</b>	Balmoral Wholesalers	<b>*Start Date:</b>	10/22/2003																																																																						
<b>Proposal Contact:</b>	Pierson,Brian	<b>*End Date:</b>	12/24/2003																																																																						
<b>Proposal Planner:</b>	Crawford,William	<b>Proposal Due:</b>	10/09/2003																																																																						
<b>Proposal Target:</b>	10/11/2003																																																																								
<b>Generate Status:</b>	Not Generated	<b>Add to My Proposals</b>	<b>Pre-Spending</b>																																																																						
<b>Comments</b>																																																																									
<table border="1"> <thead> <tr> <th colspan="2">Version</th> <th colspan="10">Overall Summary</th> <th colspan="2">Time Summary</th> <th colspan="2">Expense Summary</th> <th colspan="2">Customize</th> <th colspan="2">Find</th> <th colspan="2">First</th> <th colspan="2">1 of 1</th> <th colspan="2">Last</th> </tr> <tr> <th></th> <th>Version</th> <th colspan="2">Description</th> <th>Copy Version</th> <th>Cost Amount</th> <th>Bill Amount</th> <th>Proposed Amount</th> <th>Time Adjustment Percent</th> <th>Expense Adjustment Percent</th> <th>Time Margin Percent</th> <th>Expense Margin Percent</th> <th></th> </tr> </thead> <tbody> <tr> <td><input checked="" type="radio"/></td> <td>V101</td> <td colspan="2">Phase 1</td> <td><a href="#">Copy</a></td> <td>108,600.00</td> <td>183,900.00</td> <td>183,900.00</td> <td></td> <td></td> <td></td> <td>40.95</td> <td><a href="#">+</a></td> <td><a href="#">-</a></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>				Version		Overall Summary										Time Summary		Expense Summary		Customize		Find		First		1 of 1		Last			Version	Description		Copy Version	Cost Amount	Bill Amount	Proposed Amount	Time Adjustment Percent	Expense Adjustment Percent	Time Margin Percent	Expense Margin Percent											<input checked="" type="radio"/>	V101	Phase 1		<a href="#">Copy</a>	108,600.00	183,900.00	183,900.00				40.95	<a href="#">+</a>	<a href="#">-</a>								
Version		Overall Summary										Time Summary		Expense Summary		Customize		Find		First		1 of 1		Last																																																	
	Version	Description		Copy Version	Cost Amount	Bill Amount	Proposed Amount	Time Adjustment Percent	Expense Adjustment Percent	Time Margin Percent	Expense Margin Percent																																																														
<input checked="" type="radio"/>	V101	Phase 1		<a href="#">Copy</a>	108,600.00	183,900.00	183,900.00				40.95	<a href="#">+</a>	<a href="#">-</a>																																																												
<a href="#">Go To: Time Configuration</a> <a href="#">Set Up Options</a>																																																																									

Maintain Proposal page

**Note.** For proposals that are 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. Clicking this button changes the proposal status to *Ready* and launches an enterprise integration point (EIP) that updates the status in PeopleSoft CRM. All other status changes are prompted by an EIP.

### Proposal

Display-only. If you are adding a new proposal, the system displays *NEXT*. This automatically generates a system-assigned ID when you save the proposal. This 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 Contract Generation process, the system turns this field into a link that you can click to access the contract on the Contract - General page in PeopleSoft Contracts.

### Status

Select a value to specify the state of the proposal:

- *Draft*: Select when you are in the process of developing the proposal. The *Draft* 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.

**Note.** The Pre-Spending process doesn't generate any budget lines. It only creates Project IDs.

- *Ready*: Select if the proposal is ready to submit. You can initiate the Pre-Spending process in this status if you have created one or more projects for the proposal.

- *Denied*: Select if the proposal has been denied. You cannot change the status to *Denied* unless the proposal is in the *Ready* status.

- *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 cannot change the status to *Committed* unless the proposal is in *Ready* status.

---

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

---

- *Canceled*: Select to cancel the proposal. You cannot change the status to *Canceled* unless the proposal is in either *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 Target**

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

#### Pre-Spending

Click to initiate the Pre-Spending process. The system creates the selected projects and activities in PeopleSoft Project Costing. It does not create a contract at this time. The system also displays a green check mark next to the version you selected for pre-spending.

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

#### 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 Time Estimate and Expense Estimate pages. The system also displays a green check mark next to the version you selected for pre-spending.

#### Comments

##### Type

Select the type of comment that you want to enter: *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.

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

<b>Cost Amount, Bill Amount, and Proposed Amount</b>	Displays the total cost, total billing amount, and total amount that you propose to charge for both time and expenses for the proposal version, after adjustments.
<b>Time Adjustment Percent</b>	Displays the percent amount that you entered in the Adjustment Percent field on the Time Summary tab for overall time adjustments. This number applies to all activities that are included in the proposal version for time detail lines only. It can be either a positive or a negative number.
<b>Expense Adjustment Percent</b>	Displays the percent amount that you entered in the Adjustment Percent field on the Expense Summary tab for overall expense adjustments. This number applies to all activities that are included in the proposal version for expense detail lines only. It can be either a positive or a negative number.
<b>Time Margin Pct (time margin percent)</b>	Displays as a percentage the difference between the proposed amount and the cost amount for time (proposed amount - cost amount/proposed amount).
<b>Expense Margin Pct (expense margin percent)</b>	Displays as a percentage the difference between the proposed amount and the cost amount for expenses (proposed amount - cost amount /proposed amount).

### Time Summary Tab

<b>Adjustment Percent</b>	Enter the percent (either positive or negative) by which to make an overall adjustment to the proposed amount for time. The number that you enter here applies to all activities in the proposal version for time detail lines only.
<b>Margin Percent</b>	Displays as a percentage the difference between the proposed amount and the cost amount for time (time proposed amount - time cost amount/time proposed amount).

### Expense Summary Tab

<b>Adjustment Percent</b>	Enter the percent (either positive or negative) by which to make an overall adjustment to the proposed amount for expenses. The number that you enter here applies to all activities in the proposal version for expense detail lines only.
<b>Margin Percent</b>	Displays as a percentage the difference between the proposed amount and the cost amount for expenses (expense proposed amount - expense cost amount/expense proposed amount).

---

## Configuring Time Defaults, Bill Options, and Security

This section discusses how to:

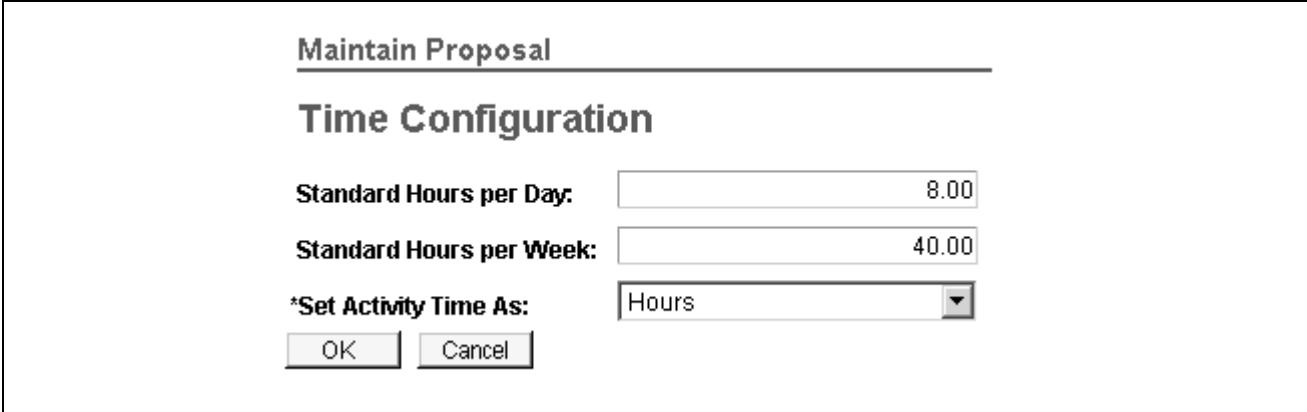
- Configure proposal time defaults.
- Set up proposal bill options and security.

## Pages Used to Configure Time Defaults, Bill Options, and Security

Page Name	Object Name	Navigation	Usage
Time Configuration	GM_OPPTY_HDR_HRS	Proposal Management, Proposal and Version, Maintain Proposal.  Click the Time Configuration link on the Maintain Proposal page.	Enter standard work hours and the method to calculate and 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.

## Configuring Proposal Time Defaults

Access the Time Configuration page.



Time Configuration page

**Standard Hours per Day** Enter the standard number of hours in a work day.

**Standard Hours per Week** Enter the standard number of hours in a work week.

**Set Activity Time As** Select a value to specify how to calculate time on the Time Estimate page. The value that you select here appears as the column heading on the Resources tab on the Time Estimate page.

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

**Note.** Do not change the value in this field if you have already created budget detail lines for the activities on the proposal.

## Setting Up Proposal Billing Options and Security

Access the Set Up Options page.

Set Up Options page

### 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 Contract Generation process, the system brings forward each item entered on the Time Estimate and Expense Estimate pages 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 time and expense 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:

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

- *Cost Rows*
- *None*

**Create Rate Options**

Select a value to specify the types of rate template target rows that you want to create for the rate template that the system will use for billing in PeopleSoft Contracts:

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

**Security**

To enable security you must first select *Yes* in the Security group box on the Contract 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 Time and Expense Estimates

This section discusses how to:

- Create time 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 Time and Expense Estimates

Page Name	Object Name	Navigation	Usage
Time Estimate	GM_OPPTY_DTL	<ul style="list-style-type: none"> <li>Proposal Management, Proposal and Version, Maintain Proposal, Version, Time Estimate</li> <li>Proposal Management, Proposal and Version, Update Proposal Version, Time Estimate</li> </ul>	Enter time and resource details for both activities and projects.
Current Bill Rate	GM_ADJUSTB_SECPNL	<p>Proposal Management, Proposal and Version, Maintain Proposal, Version, Time Estimate.</p> <p>Click the link that appears under the Adjust Bill Rate field on the Time Estimate page.</p>	Make adjustments to the billing rate.
Expense Estimate	GM_OPPTY_DTL_EX	<ul style="list-style-type: none"> <li>Proposal Management, Proposal and Version, Maintain Proposal, Version, Expense Estimate</li> <li>Proposal Management, Proposal and Version, Update Proposal Version, Expense Estimate</li> </ul>	Enter expense information for activities.
Project Control	GM_OPPTY_PRJCT_CTL	<p>Proposal Management, Proposal and Version, Maintain Proposal, Version.</p> <p>Click the Project Control link on either the Time Estimate page or the Expense Estimate page.</p>	Displays high-level project information. You can change the PeopleSoft Project Costing business unit, type, and manager.
Attachments	GM_OPPTY_DOC1	<p>Proposal Management, Proposal and Version, Maintain Proposal, Version.</p> <p>Click the Attachments and Keywords link on either the Time Estimate page or the Expense Estimate page</p>	Add documents to the proposal.
KeyWords	GM_OPPTY_KEYWORD	<p>Proposal Management, Proposal and Version, Maintain Proposal, Version.</p> <p>Click the Attachments and Keywords link on either the Time Estimate page or the Expense Estimate page. Then click the KeyWords tab</p>	Add keywords to the proposal.

Page Name	Object Name	Navigation	Usage
Summary	GM_OPPTY_SUMMARY	Proposal Management, Proposal and Version, Maintain Proposal, Version, Summary	View time and expense information at the project, activity, and overall time and expense levels.

## Creating Time and Resource Estimates

Access the Time Estimate page

The screenshot shows the Time Estimate page with the following details:

- Proposal:** CON0000000000016 Software Implementation
- Currency:** USD
- Version:** V101
- Description:** Phase 1
- Project Information:** Project: 0000000119, Description: Design. Buttons: Find, View All, First, Last, Copy Project, Project Control, +, -.
- Activity Information:** Activity: CA IMPLEMENT, Description: Write Design Documents. Buttons: Find, View All, First, Last, Create Project Team, +, -, Project Team.
- \*Product:** PPSL\_MGMT\_RATE
- \*Pricing Method:** As Incurred
- Time Information:** A table showing resources and their details:
 

Project Role	Description	Qty	Hours	Unit Cost Rate	Unit Bill Rate	Adjust Bill Rate
FUNC ANALYST	Functional Analyst	1	120	140.00	210.00	210.00
PROJ ADMIN	Project Administrator	2	120	45.00	80.00	80.00
PROJ MANAGER	Current Project Manager	1	450	180.00	310.00	310.00

Buttons at the bottom: Return to Maintain Proposal, Go To: Attachments and Keywords.

Time Estimate page

### Project Information

Each time that you create a new project or activity on the Time Estimate page, the system also creates and displays it on the Expense Estimate page.

#### 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.

---

**Note.** You can copy projects within a proposal after you run the Pre-Spending process. If the proposal is in a *Committed* status, however, the system locks down the proposal and you can no longer add projects.

---

See [Chapter 7, “Copying Projects, Versions, and Proposals,” page 65.](#)

### 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 [Chapter 6, “Preparing, Generating, and Viewing Proposal Information,” Entering Project Control Details, page 57.](#)

## Activity Information

### 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 *NEXT*. 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.

### Create Project 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.

See *PeopleSoft Project Costing 8.8 PeopleBook*, “Staffing Project and Activity Teams”.

### 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 [Chapter 3, “Defining Your Operational Structure,” Understanding Products, page 16.](#)

### Pricing Method

Select a value to specify the way in which the system prices the activity. When you run the Contract Generation 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 Contract Generation process, this field is display-only.

**Create Service Order**

Click to go to the Order Summary page in PeopleSoft Resource Management. You can use this page to enter customer, project, and organizational information for service orders. The system displays this link only if you have PeopleSoft Resource Management installed.

---

**Note.** To displays this link, you must clear the Program Management check box on the Installed Products page; otherwise all interactions with PeopleSoft Resource Management are through the Project Team pages.

---

**Go to Service Order**

Click to go to the Resource Requests page in PeopleSoft Resource Management. You can use this page to specify the required dates, qualifications, and key words to use when searching for resources to fulfill service orders. The system displays this link only if you have PeopleSoft Resource Management installed

---

**Note.** To displays this link, you must clear the Program Management check box on the Installed Products page; otherwise all interactions with PeopleSoft Resource Management are through the Project Team pages.

---

**Project Team**

Click to access the Project Team Summary page in PeopleSoft Project Costing. The Contract Generation process creates project teams if they have not been created online.

**Time Detail - Resources****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 Description, Unit Cost Rate, and Unit Bill Rate fields on the line.

---

**Note.** If the Project Role is set up in the project pricing structure (select Set Up Financials/Supply Chain, Product Related, Project Costing, Pricing Structure, Rate by Role), 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.

---

See *PeopleSoft Project Costing 8.8 PeopleBook*, “Pricing Project Costs,” Defining Role Rates.

**Qty (quantity)**

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

**Hours/Weeks/Start and End Date**

This is a dynamic column; the heading changes based on the value that you select for the Set Activity Time As field on the Time Configuration page.

Enter the total number of hours or weeks that you expect the people to work who are assigned to the project role that you selected.

If you select *Start/End Date* as the activity time, the system enters the start and end dates on the proposal as the defaults. You can change the dates as long as they are within the date range of the proposal.

**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.

**Adjust Bill Rate**

Click to access the 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 [Chapter 6, “Preparing, Generating, and Viewing Proposal Information,”](#) [Making Adjustments to the Bill Rate, page 55.](#)

**Time Detail - Schedule****Team Member**

Enter the person’s name or text to describe the team member whom you are adding to the activity.

**Description**

Enter any descriptive text related to the project role.

**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.

**Notes**

Click this link to access the Resource Note page and enter any descriptive text related to the project role.

## Making Adjustments to the Bill Rate

Access the Current Bill Rate page.

**Time Estimate**

**Current Bill Rate**

**Unit Bill Rate:** 210.00

**Adjust Bill Rate:** 210.00

**Adjust Bill Rate**

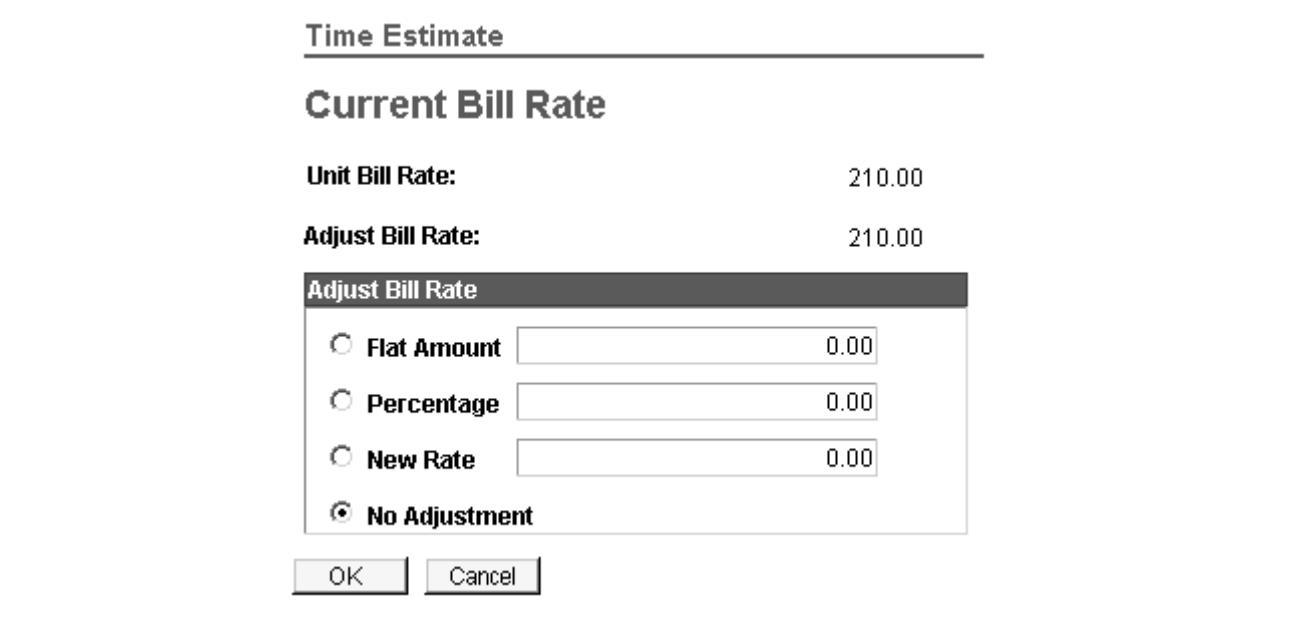
**Flat Amount** 0.00

**Percentage** 0.00

**New Rate** 0.00

**No Adjustment**

**OK** **Cancel**



Current Bill Rate page

**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.

## Creating Expense Estimates

Access the Expense Estimate page.

Time Estimate | Expense Estimate | Summary

**Proposal:** CON0000000000016 Software Implementation **Currency:** USD

**Version:** V101 **Description:** Phase 1

**Project Information** Find | View All | First | 1 of 1 | Last

**Project:** 0000000119 **Description:** Design Project Control | + | -

**Activity Information** Find | View All | First | 1 of 1 | Last

**Activity:** CA IMPLEMENT **Description:** Write Design Documents + | -

**Expense Information** Customize | Find | First | 1 of 1 | Last

Budget Item	Description	*Qty	Unit Cost Rate	Notes
PM-BUD	Car Rentals	3	540.00	Notes   +   -

[Return to Maintain Proposal](#) Go To: [Attachments and Keywords](#)

### Expense Estimate page

Each time that you create a new project or activity on the Expense Estimate page, the system creates and displays it on the Time Estimate page.

#### Activity

Select the activity type that you want to add to the project. If the activity is not listed on the Look Up Activity page, 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.

### Expense Detail

#### Budget Item

Select the budget item that is associated with the expense that you expect to incur for the activity.

#### Qty (quantity)

Enter a number to represent the number of times that you expect to incur the expense for the activity.

#### Unit Cost Rate

Enter the expected cost of the expense.

---

**Note.** You cannot make adjustments to the individual cost lines after you save the page. To make overall adjustments to expense cost lines, you must go to the Expense Summary tab on the Maintain Proposal page and enter an adjustment percent. To correct errors in this field, you must delete the entire row and add a new one.

#### Notes

Click to access the Expense Note page and enter any descriptive text that is related to the expense.

## Entering Project Control Details

Access the Project Control page.

## Project Control page

**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

<b>Projects Business Unit</b>	<p>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 Projects Business Unit field cannot be changed if you have created detail lines for Time or Expense, or when the project team has been created.</p> <hr/> <p><b>Note.</b> You cannot change the Projects Business Unit after the system creates a project team, after you initiate Pre-Spending, or after you change the proposal to the <i>Committed</i> status.</p> <hr/>
<b>Project Type</b>	<p>Select the type of project that you are adding to the proposal. You set up project types in PeopleSoft Project Costing.</p> <p>See <i>PeopleSoft Project Costing 8.8 PeopleBook</i>, “Structuring PeopleSoft Project Costing”.</p>
<b>Project Manager</b>	<p>Select the name of the person who is the manager of the project.</p>

## Adding Attachments

Access the Attachments page.

**Attachments** **KeyWords**

**Proposal:** CON0000000000016 Software Implementation

**Version:** V101 Phase 1

Document Attachments		Customize	Find	First	1-2 of 2	Last	
Requests	Attached File						
1	config.doc						
2							

[Return to Update Proposal Version](#)

Attachments page



Click the Add Attachment button 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 Update Proposal Version**

Click to return to the page from which you originally accessed the Attachments page; either the Time Estimate or the Expense Estimate page.

## Adding Key Words

Access the KeyWords page

**Attachments** **KeyWords**

**Proposal:** CON0000000000016 Software Implementation

**Version:** V101 Phase 1

Key Words		Description	Customize	Find	First	1-2 of 2	Last
*Key Word							
1	CONSULTING		Consult				
2	DESIGN		Design				

[Return to Update Proposal Version](#)

KeyWords page

**Key Word**

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



Click the Add Keyword button to enter new words that you can then associate with proposals.

**Return to Update Proposal Version** Click to return to the page from which you originally accessed the KeyWords pages, either the Time Estimate or the Expense Estimate page.

## Viewing Time and Expense Summary Information

Access the Summary page.

Time Estimate		Expense Estimate		Summary																																					
<b>Proposal:</b> CON0000000000016 Software Implementation		<b>Currency:</b> USD																																							
<b>Version:</b> V101 Phase 1		<b>Start Date:</b> 10/22/2003 <b>End Date:</b> 12/24/2003																																							
<b>*Summary By:</b>		Overall Time & Expense		Calculate Totals																																					
<b>Total Cost Amount:</b>		110,220.00		All unsaved data on the Time and Expense pages will be saved																																					
<b>Total Bill Amount:</b>		185,520.00																																							
<b>Total Adjustment Amount:</b>		0.00		<b>Time Overall Margin:</b> 40.95 %																																					
<b>Total Proposed Amount:</b>		185,520.00		<b>Expense Overall Margin:</b> 0.00 %																																					
<table border="1"> <thead> <tr> <th colspan="12">Detail</th> </tr> <tr> <th></th> <th>Project ID</th> <th>Activity ID</th> <th>Type</th> <th>Project Role</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 Pct</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>0000000119</td> <td>CA IMPLEMENT</td> <td>Time</td> <td>FUNC ANALYST</td> <td>1</td> <td>120</td> <td>140.00</td> <td>16,800.00</td> <td>210.00</td> <td>25,200.00</td> <td>33.33</td> </tr> </tbody> </table>						Detail													Project ID	Activity ID	Type	Project Role	Qty	Hours	Cost Rate	Cost Amount	Bill Rate	Bill Amount	Margin Pct	1	0000000119	CA IMPLEMENT	Time	FUNC ANALYST	1	120	140.00	16,800.00	210.00	25,200.00	33.33
Detail																																									
	Project ID	Activity ID	Type	Project Role	Qty	Hours	Cost Rate	Cost Amount	Bill Rate	Bill Amount	Margin Pct																														
1	0000000119	CA IMPLEMENT	Time	FUNC ANALYST	1	120	140.00	16,800.00	210.00	25,200.00	33.33																														

Summary page (1 of 2)

<b>Time Cost Amount:</b>	108,600.00		
<b>Time Bill Amount:</b>	183,900.00		
<b>Time Adjustment Amount:</b>	0.00	<b>Time Adjustment Percent:</b>	0.00%
<b>Time Proposed Amount:</b>	183,900.00	<b>Time Overall Margin:</b>	40.95%
<b>Cost Amount Expense:</b>	1,620.00		
<b>Expense Bill Amount:</b>	1,620.00		
<b>Expense Adjustment Amount:</b>	0.00	<b>Expense Adjustment Percent:</b>	0.00%
<b>Expense Proposed Amount:</b>	1,620.00	<b>Expense Overall Margin:</b>	0.00%
<a href="#">Return to Maintain Proposal</a>			

Summary page (2 of 2)

This page summarizes detailed and overall time and expense information by activity and by project.

**Summary By** Select a value to change the way that the system displays time and expense information:

- *Activity*.
- *Overall Time & Expense*.

- *Project.*

## 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	Object 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.

### Viewing Proposal Information

Access the My Proposals page.

**My Proposals**

Atamian,Wes

Current Proposals						Customize	Find	View All	First	◀	1 of 1	▶	Last	
	Proposal	Description	Status	Confidence Percent										Proposal Target
	CON00000000000016	Software Implementation	01 - Draft	90	<input checked="" type="radio"/>									10/11/2003

[Create New Proposal](#)

Version						
	Version	Description	Currency	Proposed Amount	Cost Amount	Time Overall Margin
<input checked="" type="checkbox"/>	V101	Phase 1	USD	185,520.00	110,220.00	40.95

[Edit List](#)

My Proposals page



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

<b>Proposal</b>	Click this link to go to the Maintain Proposal page to view that proposal.
	Indicates a low confidence level.
	Indicates a medium confidence level.
	Indicates a high confidence level.
<b>Create New Proposal</b>	Click to go to the Maintain Proposal — Add a New Value page.
<b>Version</b>	Click to go to the Time Estimate page that is associated with the proposal.
<b>Edit List</b>	Click to go to the Add/Remove Proposals page.

## Adding and Removing Proposals

Access the Add/Remove from My Proposals page.

### Add/Remove from My Proposals

Atamian,Wes

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

<b>Proposal Description</b>	<input type="text" value="%Implementation%"/>										
<b>Customer</b>	<input type="text"/> 										
<b>Proposal Contact</b>	<input type="text"/> 										
<input type="button" value="Search"/> <input type="button" value="Clear Criteria"/>											
<a href="#">Customize</a>   <a href="#">Find</a>   <a href="#">View All</a>    <span style="margin-left: 10px;">First  1 of 1  Last</span>											
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 10%;">Select</th> <th style="width: 20%;">Proposal ID</th> <th style="width: 20%;">Title</th> <th style="width: 20%;">Customer</th> <th style="width: 30%;">Proposal Contact</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;"><input checked="" type="checkbox"/></td> <td>CON00000000000016</td> <td>Software Implementation</td> <td>Balmoral Wholesalers</td> <td>Pierson,Brian</td> </tr> </tbody> </table>		Select	Proposal ID	Title	Customer	Proposal Contact	<input checked="" type="checkbox"/>	CON00000000000016	Software Implementation	Balmoral Wholesalers	Pierson,Brian
Select	Proposal ID	Title	Customer	Proposal Contact							
<input checked="" type="checkbox"/>	CON00000000000016	Software Implementation	Balmoral Wholesalers	Pierson,Brian							

Add/Remove from My Proposals page

<b>Proposal Description, Customer, and Proposal Contact</b>	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 <i>Implementation</i> , enter <i>%Implementation</i> . This search function is case sensitive.
<b>Select</b>	Select to add proposals to the My Proposals page. To remove proposals, clear this check box.

## Viewing CRM-Related Information

This section discusses how to view CRM-related information.

### Page Used to View CRM-Related Information

Page Name	Object Name	Navigation	Usage
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.

### Viewing CRM-Related Information

Access the Additional Information for CRM page.

**Maintain Proposal**

**Additional Information for CRM**

<b>Customer Contact</b>	<b>CRM</b>
<p><b>Contact Name:</b> Paula Smith</p> <p><b>Address:</b> 55 Adams Street Quincy MA 02169</p> <p><b>Telephone:</b></p> <p><b>Email:</b> psmith@xx.com</p>	<p><b>Capture ID:</b> <a href="#">a5c19c10cea911d7964c</a></p> <p><b>Product ID:</b> 10000</p> <p><b>Product Description:</b> MEN'S LONG SLEEVE BIKE JERSEY</p> <p><b>Price:</b> 20.0000</p> <p><b>Sales Rep Name:</b> Marx,Stu Manager</p> <p><b>Sales Rep Phone:</b></p> <p><b>Email Address:</b></p>

**OK** **Cancel**

Additional Information for CRM 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 PeopleSoft delivers 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.)



# CHAPTER 7

## Copying Projects, Versions, and Proposals

This chapter discusses how to:

- Copy projects.
- Copy proposal versions.
- Copy proposal information.

---

### Copying Projects

This section discusses how to copy projects.

#### Page used to Copy Projects

Page Name	Object Name	Navigation	Usage
Copy Project	GM_BUD_PPSL_CPY	Proposal Management, Proposal and Version, Maintain Proposal, Version, Time Estimate  Click the Copy Project link on the Time Estimate page.	Copy project information within the same proposal.

### Copying Projects

Access the Copy Project page

## Copy Project

**From Proposal:** CON00000000000016      **\*To Proposal:** CON00000000000016

**From Version ID:** V101      **\*To Version:** V101

Project	Find   View All	First	1 of 1	Last																		
<input checked="" type="checkbox"/> <b>From Project ID:</b> 0000000119      Design <b>To Project ID:</b> NEXT																						
<table border="1"> <thead> <tr> <th colspan="2">Activity</th> <th>Customize   Find   </th> <th>First</th> <th>1 of 1</th> <th>Last</th> </tr> <tr> <th>From Activity</th> <th>To Activity</th> <th colspan="4">*Copy Options</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/> CA IMPLEMENT</td> <td>CA IMPLEMENT </td> <td colspan="4">Time and Expense </td> </tr> </tbody> </table>					Activity		Customize   Find   	First	1 of 1	Last	From Activity	To Activity	*Copy Options				<input checked="" type="checkbox"/> CA IMPLEMENT	CA IMPLEMENT 	Time and Expense 			
Activity		Customize   Find   	First	1 of 1	Last																	
From Activity	To Activity	*Copy Options																				
<input checked="" type="checkbox"/> CA IMPLEMENT	CA IMPLEMENT 	Time and Expense 																				

**Copy**

[Copy Project page](#)

## To Proposal

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

## Project

## From Project ID

Clear this check box for all the projects that you do not want to copy to the current version of the proposal. The system automatically selects all projects when you first access this page.

## To Project ID

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

## 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: *Time and Expense* (system default), *Expense*, *Time*, 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	Object Name	Navigation	Usage
Copy Version	GM_BUD_PPSL_CPY	Proposal Management, Proposal and Version, Maintain Proposal Click the Copy Version button on the Maintain Proposal page.	Copy version information within the same proposal.

### Copying Proposal Versions

Access the Copy Version page.

Copy Version page

#### To Proposal ID

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 ID

Displays the word *NEXT*. When you click Copy, the system generates the next version ID that is available 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.

## Project

### From Project ID

The system automatically selects all projects when you enter this page. Clear 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: *Time and Expense* (system default), *Expense*, *Time*, or *None*.

### Copy

Click to initiate the copy process.

---

## Copying Proposal Information

This section discusses how to copy proposal information.

## Page Used to Copy Proposal Information

Page Name	Object Name	Navigation	Usage
Copy Proposal	GM_BUD_PPSL_CPY	Proposal Management, Proposal and Version, Copy Proposal	Copy proposal information to a new proposal.

## Copying Proposal Information

Access the Copy Proposal page.

**Copy Proposal**

<b>From Proposal:</b> CON00000000000016	<b>*To Proposal:</b> <input type="text" value="NEXT"/>																																										
<b>From Version ID:</b> V101	<b>*To Version:</b> <input type="text" value="NEXT"/>																																										
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th colspan="2" style="background-color: #333; color: white;">Project</th> <th style="text-align: right;">Find   View All</th> <th style="text-align: right;">First</th> <th style="text-align: right;">1 of 1</th> <th style="text-align: right;">Last</th> </tr> </thead> <tbody> <tr> <td colspan="2"> <input checked="" type="checkbox"/> <b>From Project ID:</b> 0000000119      Design                 </td> <td style="text-align: right;"><b>To Project ID:</b> <input type="text" value="NEXT"/></td> <td colspan="3"></td> </tr> <tr> <td colspan="6"> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th colspan="2" style="background-color: #333; color: white;">Activity</th> <th colspan="3" style="text-align: right;">Customize   Find   </th> <th style="text-align: right;">First</th> <th style="text-align: right;">1 of 1</th> <th style="text-align: right;">Last</th> </tr> <tr> <th style="width: 15%;">From Activity</th> <th style="width: 15%;">To Activity</th> <th colspan="4" style="text-align: center;">*Copy Options</th> <th colspan="2"></th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/> CA IMPLEMENT</td> <td>CA IMPLEMENT <input style="width: 100px;" type="text" value="CA IMPLEMENT"/></td> <td style="text-align: center;"></td> <td style="text-align: center;">Time and Expense</td> <td style="text-align: center;"></td> <td colspan="3"></td> </tr> </tbody> </table> </td> </tr> </tbody> </table>		Project		Find   View All	First	1 of 1	Last	<input checked="" type="checkbox"/> <b>From Project ID:</b> 0000000119      Design		<b>To Project ID:</b> <input type="text" value="NEXT"/>				<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th colspan="2" style="background-color: #333; color: white;">Activity</th> <th colspan="3" style="text-align: right;">Customize   Find   </th> <th style="text-align: right;">First</th> <th style="text-align: right;">1 of 1</th> <th style="text-align: right;">Last</th> </tr> <tr> <th style="width: 15%;">From Activity</th> <th style="width: 15%;">To Activity</th> <th colspan="4" style="text-align: center;">*Copy Options</th> <th colspan="2"></th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/> CA IMPLEMENT</td> <td>CA IMPLEMENT <input style="width: 100px;" type="text" value="CA IMPLEMENT"/></td> <td style="text-align: center;"></td> <td style="text-align: center;">Time and Expense</td> <td style="text-align: center;"></td> <td colspan="3"></td> </tr> </tbody> </table>						Activity		Customize   Find			First	1 of 1	Last	From Activity	To Activity	*Copy Options						<input checked="" type="checkbox"/> CA IMPLEMENT	CA IMPLEMENT <input style="width: 100px;" type="text" value="CA IMPLEMENT"/>		Time and Expense				
Project		Find   View All	First	1 of 1	Last																																						
<input checked="" type="checkbox"/> <b>From Project ID:</b> 0000000119      Design		<b>To Project ID:</b> <input type="text" value="NEXT"/>																																									
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th colspan="2" style="background-color: #333; color: white;">Activity</th> <th colspan="3" style="text-align: right;">Customize   Find   </th> <th style="text-align: right;">First</th> <th style="text-align: right;">1 of 1</th> <th style="text-align: right;">Last</th> </tr> <tr> <th style="width: 15%;">From Activity</th> <th style="width: 15%;">To Activity</th> <th colspan="4" style="text-align: center;">*Copy Options</th> <th colspan="2"></th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/> CA IMPLEMENT</td> <td>CA IMPLEMENT <input style="width: 100px;" type="text" value="CA IMPLEMENT"/></td> <td style="text-align: center;"></td> <td style="text-align: center;">Time and Expense</td> <td style="text-align: center;"></td> <td colspan="3"></td> </tr> </tbody> </table>						Activity		Customize   Find			First	1 of 1	Last	From Activity	To Activity	*Copy Options						<input checked="" type="checkbox"/> CA IMPLEMENT	CA IMPLEMENT <input style="width: 100px;" type="text" value="CA IMPLEMENT"/>		Time and Expense																		
Activity		Customize   Find			First	1 of 1	Last																																				
From Activity	To Activity	*Copy Options																																									
<input checked="" type="checkbox"/> CA IMPLEMENT	CA IMPLEMENT <input style="width: 100px;" type="text" value="CA IMPLEMENT"/>		Time and Expense																																								
<input type="button" value="Copy"/>																																											

Copy Proposal page

---

**Note.** When you copy a proposal, the system does not copy project teams.

---

**To Proposal ID**

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

**To Version ID**

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

**Project**

**From Project ID**

Clear 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 project ID that is available.

**Activity**

**From Activity**

Clear 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: *Time and Expense* (system default), *Expense*, *Time*, or *None*.

**Copy**

Click to initiate the copy process.



## CHAPTER 8

# Generating PeopleSoft Proposal Management Reports

This chapter provides an overview of proposal reports and discusses how to:

- Generate proposal reports.
- Generate pipeline reports.
- Generate resource reports.
- Retrieve proposal information.

---

## 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

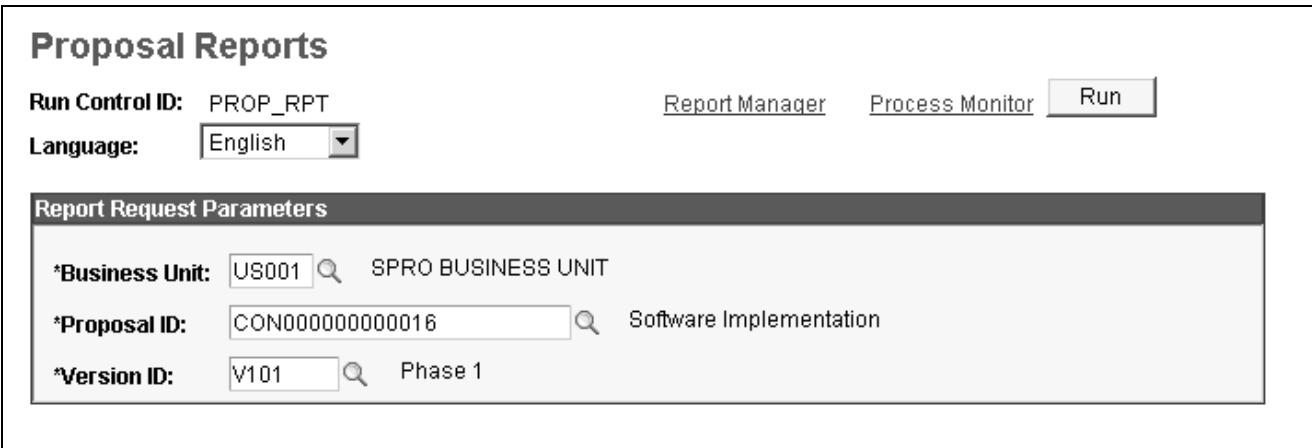
This section discusses how to generate proposal reports.

### Page Used to Generate Proposal Reports

Page Name	Object Name	Navigation	Usage
Proposal Reports	RUN_GM_PROP_RPT	Proposal Management, Reports, Proposal Reports	Review proposed time and expenses for a particular proposal.

## Generating Proposal Reports

Access the Proposal Reports page.



The screenshot shows the 'Proposal Reports' page. At the top, there are fields for 'Run Control ID: PROP\_RPT' and 'Language: English'. Below these are buttons for 'Report Manager', 'Process Monitor', and a large 'Run' button. A section titled 'Report Request Parameters' contains fields for: 'Business Unit: US001' (with a search icon), 'Proposal ID: CON0000000000016' (with a search icon and the label 'Software Implementation'), and 'Version ID: V101' (with a search icon and the label 'Phase 1').

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

Page Name	Object Name	Navigation	Usage
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.

## Generating Pipeline Reports

Access the Revenue Pipeline Reports page.

**Revenue Pipeline Reports**

Run Control ID: REV_PIPE	<a href="#">Report Manager</a>	<a href="#">Process Monitor</a>	<input type="button" value="Run"/>														
Language: English																	
<table border="1"> <tr> <th colspan="2">Report Request Parameters</th> </tr> <tr> <td>*Business Unit:</td> <td>US001 <input type="button" value="Search"/></td> </tr> <tr> <td>Proposal Status:</td> <td>Draft <input type="button" value="Search"/></td> </tr> <tr> <td>*Confidence:</td> <td>55 *To: 100</td> </tr> <tr> <td>Customer:</td> <td>Alliance Group <input type="button" value="Search"/></td> </tr> <tr> <td>Proposal Contact:</td> <td>Angelini,Gina <input type="button" value="Search"/></td> </tr> <tr> <td>*Proposal Target Due Date:</td> <td>10/01/2003 <input type="button" value="Search"/> *To: 10/31/2003 <input type="button" value="Search"/></td> </tr> </table>				Report Request Parameters		*Business Unit:	US001 <input type="button" value="Search"/>	Proposal Status:	Draft <input type="button" value="Search"/>	*Confidence:	55 *To: 100	Customer:	Alliance Group <input type="button" value="Search"/>	Proposal Contact:	Angelini,Gina <input type="button" value="Search"/>	*Proposal Target Due Date:	10/01/2003 <input type="button" value="Search"/> *To: 10/31/2003 <input type="button" value="Search"/>
Report Request Parameters																	
*Business Unit:	US001 <input type="button" value="Search"/>																
Proposal Status:	Draft <input type="button" value="Search"/>																
*Confidence:	55 *To: 100																
Customer:	Alliance Group <input type="button" value="Search"/>																
Proposal Contact:	Angelini,Gina <input type="button" value="Search"/>																
*Proposal Target Due Date:	10/01/2003 <input type="button" value="Search"/> *To: 10/31/2003 <input type="button" value="Search"/>																

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

## Generating Resource Reports

This section discusses how to generate resource reports.

### Page Used to Generate Resource Reports

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

## Generating Resource Reports

Access the Resource Demand Report page.

**Resource Demand Report**

Run Control ID: RES\_DEMAND      Report Manager      Process Monitor      **Run**

Language: English

**Report Request Parameters**

\*Business Unit: AUS01  AUSTRALIA OPERATIONS

Proposal Status: Ready

\*Confidence: 75 \*To: 100

\*Resource Schedule Start Date: 10/01/2003  \*To: 12/31/2003

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 Resource Demand by 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	Object Name	Navigation	Usage
Proposal Inquiry	GM_PROPOSAL_INQ	Proposal Management, Interactive Reports, Proposal Inquiry	Retrieve proposal information.

## Retrieving Proposal Information

Access the Proposal Inquiry page.

**Proposal Inquiry**

Search Criteria			
Business Unit:	EGV05 	Start Date:	<input type="text"/> 
Customer ID:	<input type="text"/> 	End Date:	<input type="text"/> 
Proposal Planner:	IXHEEE102 	Due Date:	10/10/2003 
Status:	<input type="button" value="Retrieve"/> <input type="button" value="Clear"/>		
<a href="#">Customize</a>   <a href="#">Find</a>   <a href="#">View All</a>   			
<b>Proposal Info</b> <a href="#">More Info</a> 			
Proposal ID	Title	Customer	Proposal Planner
1 CON000000004001	 Design	Alliance Group	Angelini,Gina

Proposal Inquiry page

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.



# CHAPTER 9

## Administering Projects

This chapter provides an overview on how projects are used in PeopleSoft Proposal Management.

---

### Understanding How Projects are Used in 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.

---

**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 Contract Generation 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.

You can systematically create a project during the Contract Generation process or the Pre-Spending process in PeopleSoft Proposal Management, or you can add a project manually through the project definition pages in PeopleSoft Project Costing. However, you should only add projects manually after you have run the Contract Generation process. Within PeopleSoft Project Costing you can also attach a project to a contract and a contract line within the Project Definition pages.

## See Also

*PeopleSoft Project Costing 8.8 PeopleBook*, “Creating and Maintaining Projects”

## 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 cleared.

---

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 8.8 PeopleBook*.

## See Also

*PeopleSoft Project Costing 8.8 PeopleBook*, “Working with Transactions,” Controlling Incoming Transactions

*PeopleSoft Project Costing 8.8 PeopleBook*, “Structuring PeopleSoft Project Costing”

## Project Analysis

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

- At least one project.
- Project activities.
- Transactions that have been assigned resource IDs.

Once 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, Inventory, Payables, Purchasing, and Time and Labor.

Instructions on analyzing project data appear in the *PeopleSoft Project Costing 8.8 PeopleBook*.

### See Also

*PeopleSoft Project Costing 8.8 PeopleBook*, “Analyzing Projects”

## 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 8.8 PeopleBook*.

### See Also

*PeopleSoft Project Costing 8.8 PeopleBook*, “Analyzing Projects,” Viewing Transactions in Progress

## 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 8.8 PeopleBook*.

### See Also

*PeopleSoft Project Costing 8.8 PeopleBook*, “Analyzing Projects,” Understanding Analysis Inquiries



# CHAPTER 10

## Integrating with PeopleSoft Billing

This chapter provides an overview of the billing process and how it relates to PeopleSoft Proposal Management.

---

### Understanding the Billing Process

This section discusses:

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

### System Preparation

PeopleSoft Proposal Management integrates with PeopleSoft Contracts, Project Costing and 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 GL/AR Options.

Step	Navigation
Define a Billing business unit.	Select Set Up Financials/Supply Chain, Business Unit Related, Billing, Billing Definition, Business Unit 1.
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, Maintain Proposal. Click the Generate button.
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>Active</i> .	Select Customer Contracts, Create and Amend, General Information, General. Click the Billing Plans link. Then click the Billing Plan ID.
Create billable rows in PeopleSoft Project Costing (you can use either method described below): <ul style="list-style-type: none"> <li>• Populate the Project Resource table (PROJ_RESOURCE) through the Project Integration process.</li> <li>• Add transactions directly into PeopleSoft Project Costing.</li> </ul> <p><b>Note.</b> The methods for creating billable rows described above are for rate-based billing only.</p>	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, Add Transactions.

## Process Overview

For rate-based billing in PeopleSoft Proposal Management, the Contracts/Billing Interface process (CA\_BL\_INTC) 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). Once 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.

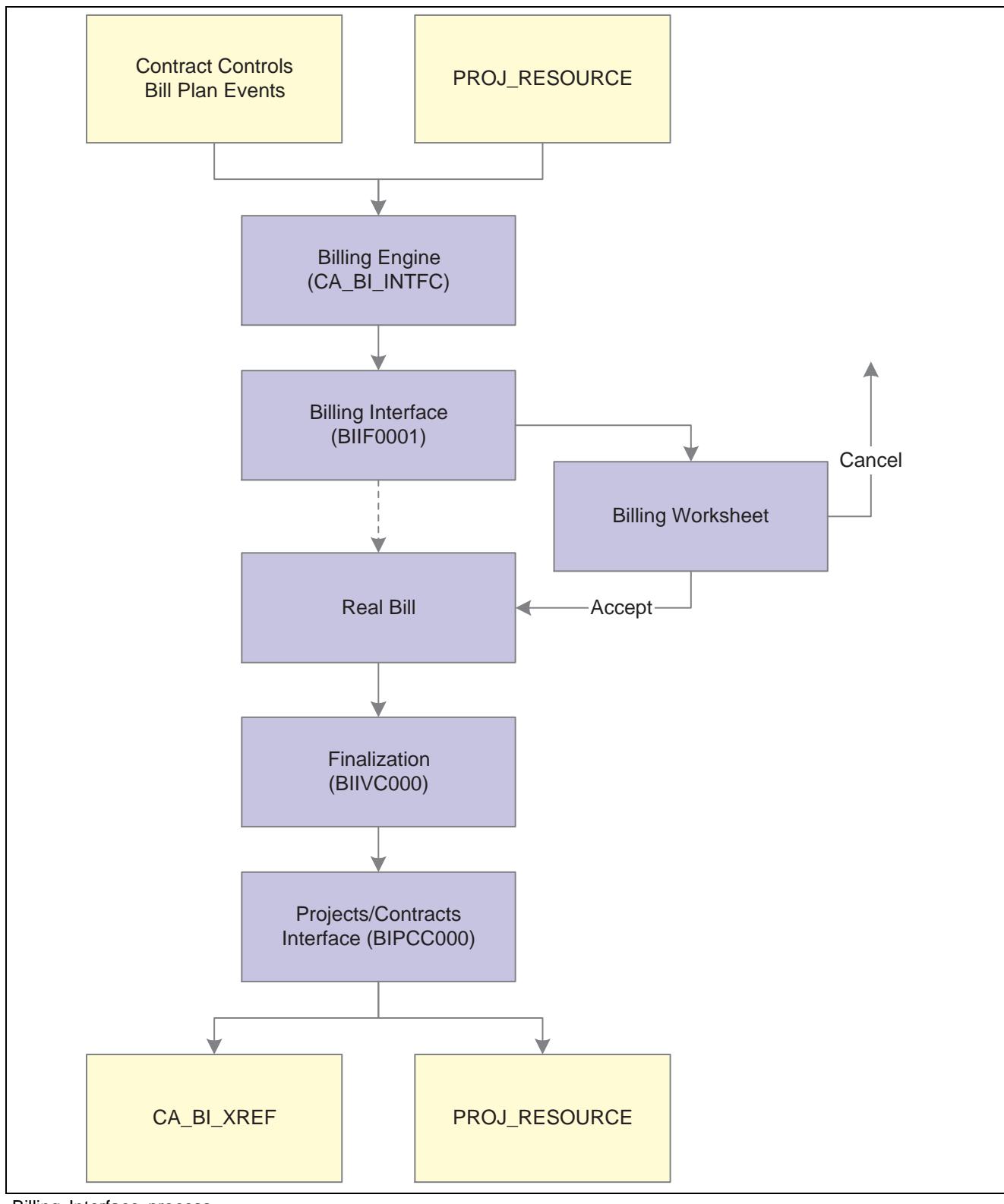
- Real bills

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).

This flow chart illustrates the Billing Interface process (BIIF0001):



Billing Interface process

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

### See Also

*PeopleSoft Billing 8.8 PeopleBook*, “Integrating With PeopleSoft Contracts, Project Costing, Grants, and Pay/Bill Management”

*PeopleSoft Contracts 8.8 PeopleBook*, “Setting Up Billing Plans”

## The Contracts/Billing Interface Process

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

Instructions on running the Contracts/Billing Interface process appear in the *PeopleSoft Contracts 8.8 PeopleBook*.

### See Also

*PeopleSoft Contracts 8.8 PeopleBook*, “Processing PeopleSoft Contracts Billing”

## 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 that came through the Billing Interface process before you create actual bills.

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

Instructions on running the Billing Interface process appear in the *PeopleSoft Billing 8.8 PeopleBook*.

### See Also

*PeopleSoft Billing 8.8 PeopleBook*, “Processing Billing Interface Activity”

*PeopleSoft Billing 8.8 PeopleBook*, “Correcting Billing Interface Process Errors”

*PeopleSoft Billing 8.8 PeopleBook*, “Integrating With PeopleSoft Contracts, Project Costing, Grants, and Pay/Bill Management”

## 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 on approving billing worksheets appear in the *PeopleSoft Billing 8.8 PeopleBook*.

### See Also

*PeopleSoft Billing 8.8 PeopleBook*, “Integrating With PeopleSoft Contracts, Project Costing, Grants, and Pay/Bill Management,” Using the Billing Worksheet Component

## 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 on deleting billing worksheets appear in the *PeopleSoft Billing 8.8 PeopleBook*.

### See Also

*PeopleSoft Billing 8.8 PeopleBook*, “Integrating With PeopleSoft Contracts, Project Costing, Grants, and Pay/Bill Management,” Using the Billing Worksheet Component

## 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 on running the Finalization process appear in the *PeopleSoft Billing 8.8 PeopleBook*.

### See Also

*PeopleSoft Billing 8.8 PeopleBook*, “Generating Invoices”

## 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 on running the Projects/Contracts Interface process appear in the *PeopleSoft Billing 8.8 PeopleBook*.

### See Also

*PeopleSoft Billing 8.8 PeopleBook*, “Integrating With PeopleSoft Contracts, Project Costing, Grants, and Pay/Bill Management,” Running the PeopleSoft Billing to Projects/Contracts Interface Process

## 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 on 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.

### See Also

*PeopleSoft Billing 8.8 PeopleBook*, “Processing Deferred Revenue Accounting Entries”

## CHAPTER 11

# Integrating PeopleSoft Proposal Management with Other Applications

PeopleSoft Proposal Management provides a full-featured project estimation tool which integrates directly with PeopleSoft Contracts, Project Costing, and Customer Relationship Management.

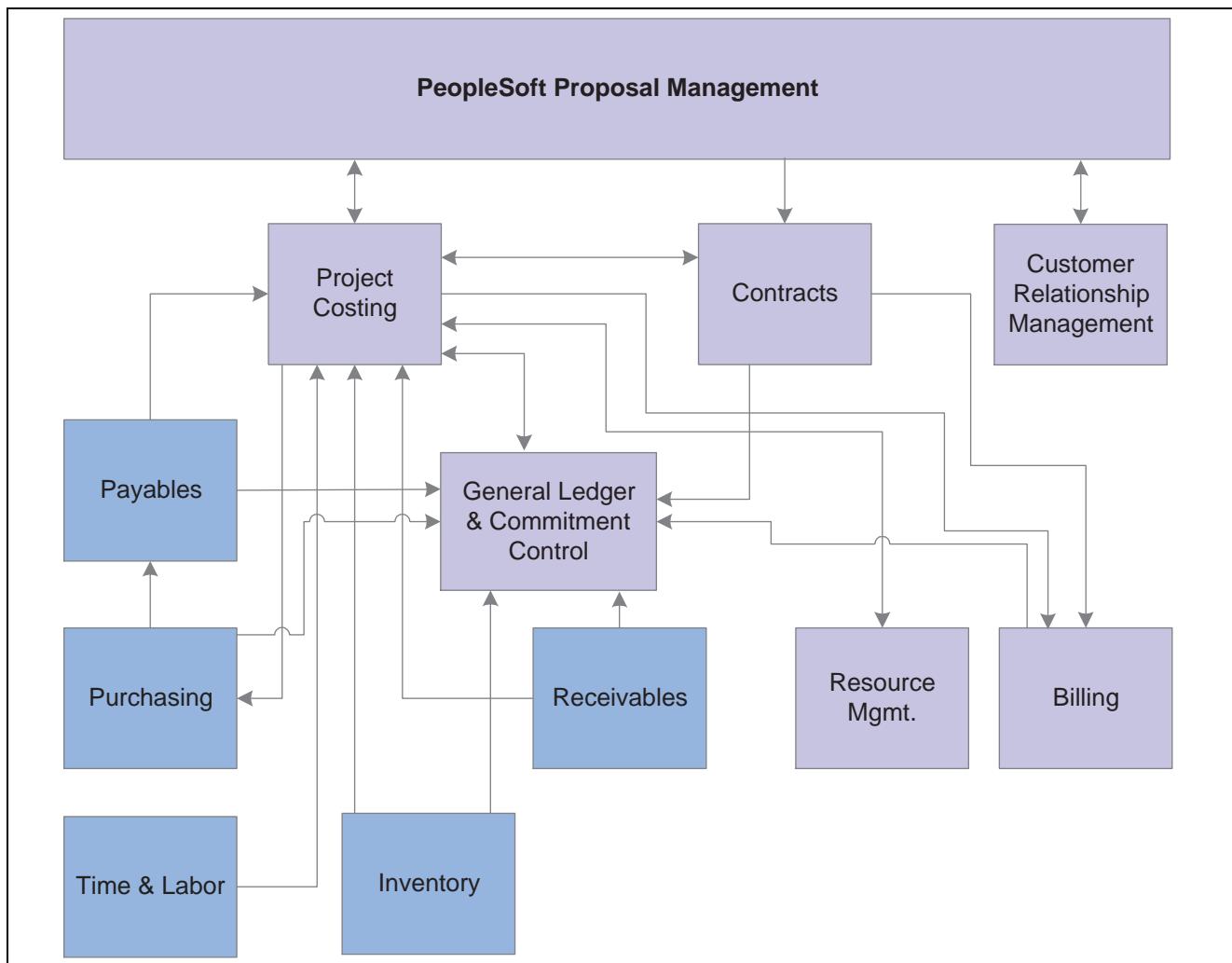
In addition PeopleSoft Contracts and PeopleSoft Project Costing integrate directly with PeopleSoft Human Resources, Time & Labor, Billing, General Ledger, Receivables, Purchasing, Inventory, and Payables. Additionally, you can integrate PeopleSoft Proposal Management with third-party applications.

This chapter provides an overview of integration process flows and describes the way these products integrate with one another.

---

## Understanding Integration Process Flows

The following diagram shows how PeopleSoft Proposal Management interacts with the other applications in PeopleSoft Financials and PeopleSoft Customer Relationship Management.



Proposal Management integration with other PeopleSoft applications

This section discusses:

- PeopleSoft Customer Relationship Management.
- PeopleSoft Contracts and PeopleSoft Project Costing.
- PeopleSoft Time and Labor.
- PeopleSoft General Ledger.
- PeopleSoft Receivables.
- The Procurement Process.
- PeopleSoft Purchasing.
- PeopleSoft Inventory.
- PeopleSoft Payables.
- Integration with third-party systems.

## 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 both time and expense 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 = 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  <b>Note.</b> System uses either record depending on if the quote has a lead or an opportunity attached.	SALES_USER_NAME	GM_PROPOSAL	SALESREP_NAME
<b>Note.</b> 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 = Proposal Management	
<b>Note.</b> 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 = 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		

---

**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, the system reopens the proposal for pricing (proposal status is updated to *Draft*).

## Quote Integration

Once 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 = 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 cancelled (quotes expire after a specified time interval), or when the order line needs to be re-priced.

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 = Proposal Management	
Record	Field	Record	Field
RO_ASSOCIATION	PROPOSAL_ID	GM_PROPOSAL	PROPOSAL_ID
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

Source = CRM		Target = Proposal Management	
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.
- If the status is *Ready* when a user selects a proposal, the system locks the proposal version and prevents editing.

## statuses

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

PeopleSoft Proposal Management Statuses	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 Also

*PeopleSoft Enterprise Components*, “Activating Messaging EIPs”

*PeopleTools PeopleBook: PeopleSoft Integration Broker*

## PeopleSoft Contracts and PeopleSoft Project Costing

Through the Contract Generation process, PeopleSoft Proposal Management writes data to PeopleSoft Contracts and PeopleSoft Project Costing. The following section shows the tables that are written to during the PeopleSoft Proposal Management Contract Generation process.

The system writes data to these PeopleSoft Contracts tables during the PeopleSoft Proposal Management Contract Generation 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 tables during the PeopleSoft Proposal Management Contract Generation process:

- PROJECT
- PROJ\_ACTIVITY
- PC\_RATE
- PC\_RATE\_DTL
- PC\_RATE\_DTL\_LN
- PROJECT\_MGR
- 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 Websites and EDI transaction sets often incorporate data elements that are included in the PeopleSoft Project Costing pages.

---

## See Also

*PeopleSoft Grants 8.8 PeopleBook*, “Establishing Awards and Projects,” Establishing Project Profiles

*PeopleSoft Grants 8.8 PeopleBook*, “Establishing Awards and Projects,” Establishing Project Activities

## 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 utilizes an estimation process linked with PeopleSoft 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 rows (TLB) 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.

---

## See Also

*PeopleSoft Project Costing 8.8 PeopleBook*, “Integrating with PeopleSoft Time and Labor”

*PeopleTools PeopleBook: PeopleSoft Integration Broker*

## PeopleSoft General Ledger

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

### Single-Sided Transactions

Once you create accounting entry templates to generate double-sided entries, run the PC Accounting Distributions process. This process uses the accounting entry templates to generate double-sided entries and write them to the Project Resource Distribution Line table (PC\_DIST\_LN).

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 General Ledger to Projects Interface process (PC\_GL\_TO\_PC).

## See Also

*PeopleSoft Project Costing 8.8 PeopleBook*, “Integrating with PeopleSoft General Ledger”

## PeopleSoft Commitment Control

PeopleSoft Commitment Control is an optional feature of the PeopleSoft FMS, ESA, and SCM product lines that enables you to control expenditures actively against predefined, authorized budgets. In particular, 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. Once 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.

## See Also

*PeopleSoft 8.8 Setting Up and Using Commitment Control PeopleBook*, “Understanding Commitment Control Integration with PeopleSoft and Third-Party Applications”

## 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 on the progress of a project in terms of the outstanding revenue.

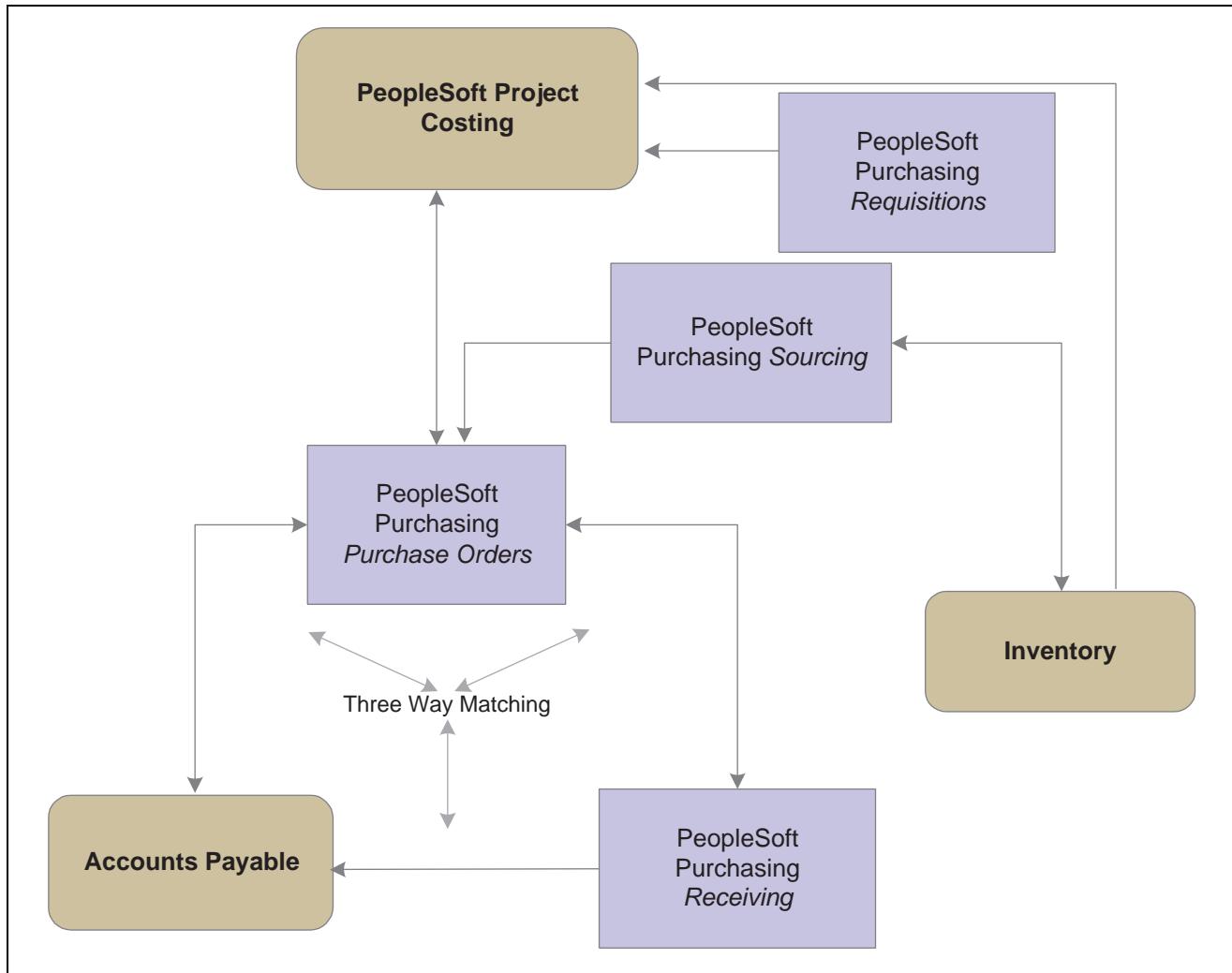
The Receivables to Projects process (PC\_AR\_TO\_PC) moves data from PeopleSoft Accounts Receivables to PeopleSoft Project Costing. The system identifies entry type and system functions for revenue related adjustments in AR and only those rows are moved to the Project Resource table.

## See Also

*PeopleSoft Project Costing 8.8 PeopleBook*, “Integrating with PeopleSoft Receivables”

## The Procurement Process

You can enter requisitions into PeopleSoft Purchasing, then pull them into PeopleSoft Project Costing for tracking purposes. Here is how PeopleSoft Project Costing handles the procurement process when it is integrated with PeopleSoft Purchasing, Payables and Inventory:



The procurement process

## 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 PeopleSoft 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.

### See Also

*PeopleSoft Project Costing 8.8 PeopleBook, “Tracking Procurement Costs”*

## PeopleSoft Inventory

Once you identify an item on a requisition as an inventory item by the sourcing routine in PeopleSoft, 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.

### See Also

*PeopleSoft Project Costing 8.8 PeopleBook, “Tracking Procurement Costs,”*  
Integrating with PeopleSoft Inventory

## PeopleSoft Payables

Once 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. Once 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 system defaults the analysis type to ACT.

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.

### See Also

*PeopleSoft Project Costing 8.8 PeopleBook, “Tracking Procurement Costs,”*  
Integrating with PeopleSoft Payables

## Integrating Proposal Management 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 out of your third-party systems into a database table or a flat file, and then import that information into the PeopleSoft Project Costing interface tables.

## See Also

*PeopleSoft Project Costing 8.8 PeopleBook*, “Integrating With Third-Party Applications”

## APPENDIX A

# PeopleSoft Proposal Management Reports

This appendix provides an overview of PeopleSoft Proposal Management reports and enables you to view a summary table of all reports.

---

**Note.** For samples of these reports, see the Portable Document Format (PDF) files that are published on CD-ROM with your documentation.

---

### See Also

[Chapter 8, “Generating PeopleSoft Proposal Management Reports,” page 71](#)

---

## PeopleSoft Proposal Management Reports: A to Z

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

### PeopleSoft Proposal Management Proposal Reports

Report ID and Report Name	Description	Navigation	Run Control Page
PM1100 Fixed Fee	Review proposed time and expenses for a particular proposal.	Proposal Management, Reports, Proposal Reports	RUN_GM_PROP_RPT
PM1110 Fixed Fee Itemized	Review proposed time and expenses for a particular proposal, including adjustments.	Proposal Management, Reports, Proposal Reports	RUN_GM_PROP_RPT
PM1120 Internal	Review proposed time and expenses 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 Tenth	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

# Glossary of PeopleSoft Terms

<b>absence entitlement</b>	This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.
<b>absence take</b>	This element defines the conditions that must be met before a payee is entitled to take paid time off.
<b>accounting class</b>	In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.
<b>accounting date</b>	The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.
<b>accounting split</b>	The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.
<b>accumulator</b>	You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.
<b>action reason</b>	The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another—and a reason for that action. Action reasons are used by PeopleSoft Human Resources, PeopleSoft Benefits Administration, PeopleSoft Stock Administration, and the COBRA Administration feature of the Base Benefits business process.
<b>action template</b>	In PeopleSoft Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition.
<b>activity</b>	In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.
	In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.
	In PeopleSoft Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks.
	In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.

<b>agreement</b>	In PeopleSoft eSettlements, provides a way to group and specify processing options, such as payment terms, pay from a bank, and notifications by a buyer and supplier location combination.
<b>allocation rule</b>	In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure from the current node to the root node, checking each node for plans that contain allocation rules.
<b>alternate account</b>	A feature in PeopleSoft General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.
<b>AR specialist</b>	Abbreviation for <i>receivables specialist</i> . In PeopleSoft Receivables, an individual in who tracks and resolves deductions and disputed items.
<b>arbitration plan</b>	In PeopleSoft Enterprise Pricer, defines how price rules are to be applied to the base price when the transaction is priced.
<b>assessment rule</b>	In PeopleSoft Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action.
<b>asset class</b>	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
<b>attribute/value pair</b>	In PeopleSoft Directory Interface, relates the data that makes up an entry in the directory information tree.
<b>authentication server</b>	A server that is set up to verify users of the system.
<b>base time period</b>	In PeopleSoft Business Planning, the lowest level time period in a calendar.
<b>benchmark job</b>	In PeopleSoft Workforce Analytics, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
<b>book</b>	In PeopleSoft Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.
<b>branch</b>	A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.
<b>budgetary account only</b>	An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called "system-maintained account."
<b>budget check</b>	In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.
<b>budget control</b>	In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.
<b>budget period</b>	The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.
<b>business event</b>	In PeopleSoft Receivables, defines the processing characteristics for the Receivable Update process for a draft activity.

<b>business unit</b>	In PeopleSoft Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).
<b>buyer</b>	In PeopleSoft eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system.
<b>catalog item</b>	In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, “Introduction to Microsoft Word.” A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods. A catalog item can have one or more learning activities.
<b>catalog map</b>	In PeopleSoft Catalog Management, translates values from the catalog source data to the format of the company’s catalog.
<b>catalog partner</b>	In PeopleSoft Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.
<b>categorization</b>	Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.
<b>channel</b>	In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.
<b>ChartField</b>	A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft application. ChartField values represent individual account numbers, department codes, and so forth.
<b>ChartField balancing</b>	You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.
<b>ChartField combination edit</b>	The process of editing journal lines for valid ChartField combinations based on user-defined rules.
<b>ChartKey</b>	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
<b>checkbook</b>	In PeopleSoft Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.
<b>Class ChartField</b>	A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called <i>sub-classification</i> .
<b>clone</b>	In PeopleCode, to make a unique copy. In contrast, to <i>copy</i> may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.
<b>collection</b>	To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleSoft maintains a set of collections (one per language code) for each search index object.

<b>collection rule</b>	In PeopleSoft Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.
<b>compensation object</b>	In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.
<b>compensation structure</b>	In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.
<b>condition</b>	In PeopleSoft Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.
<b>configuration parameter catalog</b>	Used to configure an external system with PeopleSoft. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.
<b>configuration plan</b>	In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.
<b>content reference</b>	Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.
<b>context</b>	In PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running.
<b>control table</b>	In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.
<b>cost profile</b>	Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.
<b>cost row</b>	A cost transaction and amount for a set of ChartFields.
<b>current learning</b>	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.
<b>data acquisition</b>	In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).
<b>data elements</b>	Data elements, at their simplest level, define a subset of data and the rules by which to group them.
<b>dataset</b>	For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.
<b>dataset</b>	A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.

<b>delivery method</b>	In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method.
<b>delivery method type</b>	In PeopleSoft Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, rail, and so on). The delivery method is specified when creating shipment schedules.
<b>directory information tree</b>	In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.
<b>document sequencing</b>	
<b>dynamic detail tree</b>	A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.
<b>edit table</b>	A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft application, they can be validated against an edit table to ensure data integrity throughout the system.
<b>effective date</b>	A method of dating information in PeopleSoft applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.
<b>EIM ledger</b>	Abbreviation for <i>Enterprise Incentive Management ledger</i> . In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.
<b>elimination set</b>	In PeopleSoft General Ledger, a related group of intercompany accounts that is processed during consolidations.
<b>entry event</b>	In PeopleSoft General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.
<b>equitization</b>	In PeopleSoft General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.
<b>event</b>	A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete.
<b>event propagation process</b>	In PeopleSoft Human Resources, also refers to an incident that affects benefits eligibility.
<b>event propagation process</b>	In PeopleSoft Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects.

	Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.
<b>exception</b>	In PeopleSoft Receivables, an item that either is a deduction or is in dispute.
<b>exclusive pricing</b>	In PeopleSoft Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions.
<b>fact</b>	In PeopleSoft applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.
<b>forecast item</b>	A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage.
<b>fund</b>	In PeopleSoft Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual.
<b>generic process type</b>	In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.
<b>group</b>	In PeopleSoft Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs).
	In PeopleSoft Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.
<b>incentive object</b>	In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, user interaction objects, and so on.
<b>incentive rule</b>	In PeopleSoft Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.
<b>incur</b>	In PeopleSoft Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.
<b>item</b>	In PeopleSoft Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse).
	In PeopleSoft Demand Planning, Inventory Policy Planning, and Supply Planning, a noninventory item that is designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material (BOM) or planning routing, and it can exist as a component on a planning BOM. A planning item cannot be specified on a production or engineering BOM or routing, and it cannot be used as a component in a production. The quantity on hand will never be maintained.
	In PeopleSoft Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.
<b>KPI</b>	An abbreviation for <i>key performance indicator</i> . A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.

<b>LDIF file</b>	Abbreviation for <i>Lightweight Directory Access Protocol (LDAP) Data Interchange Format file</i> . Contains discrepancies between PeopleSoft data and directory data.
<b>learner group</b>	In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office.
<b>learning components</b>	In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity.
<b>learning environment</b>	In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them.
<b>learning history</b>	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.
<b>ledger mapping</b>	You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as <i>rates</i> ) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.
<b>library section</b>	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.
<b>linked section</b>	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.
<b>linked variable</b>	In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.
<b>load</b>	In PeopleSoft Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Inventory that is used to track the weight, the volume, and the destination of a shipment.
<b>local functionality</b>	In PeopleSoft HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.
<b>location</b>	Locations enable you to indicate the different types of addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a <i>1</i> —is the address you use most often and may be different from the main address.
<b>logistical task</b>	In PeopleSoft Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new

laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.

**market template**

In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.

**match group**

In PeopleSoft Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.

**MCF server**

Abbreviation for *PeopleSoft MultiChannel Framework server*. Comprises the universal queue server and the MCF log server. Both processes are started when *MCF Servers* is selected in an application server domain configuration.

**merchandising activity**

In PeopleSoft Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.

**meta-SQL**

Meta-SQL constructs expand into platform-specific Structured Query Language (SQL) substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.

**metastring**

Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.

**multibook**

In PeopleSoft General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers).

**multicurrency**

The ability to process transactions in a currency other than the business unit's base currency.

**national allowance**

In PeopleSoft Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.

**node-oriented tree**

A tree that is based on a detail structure, but the detail values are not used.

**pagelet**

Each block of content on the home page is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft and non-PeopleSoft content.

**participant**

In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.

**participant object**

Each participant object may be related to one or more compensation objects.

See also *compensation object*.

**partner**

A company that supplies products or services that are resold or purchased by the enterprise.

**pay cycle**

In PeopleSoft Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.

**pending item**

In PeopleSoft Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.

<b>PeopleCode</b>	PeopleCode is a proprietary language, executed by the PeopleSoft application processor. PeopleCode generates results based upon existing data or user actions. By using business interlink objects, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.
<b>PeopleCode event</b>	An action that a user takes upon an object, usually a record field, that is referenced within a PeopleSoft page.
<b>PeopleSoft Internet Architecture</b>	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (RDBMS), an application server, a web server, and a browser.
<b>performance measurement</b>	In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.
<b>period context</b>	In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.
<b>plan</b>	In PeopleSoft Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.
<b>plan context</b>	In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context—if three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.
<b>plan template</b>	In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.
<b>planned learning</b>	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.
<b>planning instance</b>	In PeopleSoft Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.
<b>portal registry</b>	In PeopleSoft applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.
<b>price list</b>	In PeopleSoft Enterprise Pricer, enables you to select products and conditions for which the price list applies to a transaction. During a transaction, the system either determines the product price based on the predefined search hierarchy for the transaction or uses the product's lowest price on any associated, active price lists. This price is used as the basis for any further discounts and surcharges.
<b>price rule</b>	In PeopleSoft Enterprise Pricer, defines the conditions that must be met for adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met.

<b>price rule condition</b>	In PeopleSoft Enterprise Pricer, selects the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields are related to the transaction.
<b>price rule key</b>	In PeopleSoft Enterprise Pricer, defines the fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.
<b>process category</b>	In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.
<b>process group</b>	In PeopleSoft Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.
<b>process definition</b>	Process definitions define each run request.
<b>process instance</b>	A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.
<b>process job</b>	You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.
<b>process request</b>	A single run request, such as a Structured Query Report (SQR), a COBOL or Application Engine program, or a Crystal report that you run through PeopleSoft Process Scheduler.
<b>process run control</b>	A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.
<b>product category</b>	In PeopleSoft Enterprise Incentive Management, indicates an application in the Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.
<b>programs</b>	In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.
<b>progress log</b>	In PeopleSoft Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.
<b>project transaction</b>	In PeopleSoft Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.
<b>promotion</b>	In PeopleSoft Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.
<b>publishing</b>	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
<b>record group</b>	A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.
<b>record input VAT flag</b>	Abbreviation for <i>record input value-added tax flag</i> . Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT

<b>record output VAT flag</b>	on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Expenses, where it is assumed that you are always recording only input VAT.
<b>reference data</b>	Abbreviation for <i>record output value-added tax flag</i> .
<b>reference object</b>	See <i>record input VAT flag</i> .
<b>reference transaction</b>	In PeopleSoft Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, channels, and so on.
<b>relationship object</b>	In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).
<b>regional sourcing</b>	In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.
<b>remote data source data</b>	In PeopleSoft Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.
<b>REN server</b>	In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.
<b>requester</b>	Data that is extracted from a separate database and migrated into the local database.
<b>role</b>	Abbreviation for <i>real-time event notification server</i> in PeopleSoft MultiChannel Framework.
<b>role user</b>	In PeopleSoft eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.
<b>roll up</b>	Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.
<b>run control</b>	A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.
<b>run control ID</b>	In a tree, to roll up is to total sums based on the information hierarchy.
	A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.
	A unique ID to associate each user with his or her own run control table entries.

<b>run-level context</b>	In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.
<b>search query</b>	You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.
<b>section</b>	In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.
<b>security event</b>	In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.
<b>serial genealogy</b>	In PeopleSoft Manufacturing, the ability to track the composition of a specific, serial-controlled item.
<b>serial in production</b>	In PeopleSoft Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.
<b>session</b>	In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.
<b>session template</b>	In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity—characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.
<b>setup relationship</b>	In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.
<b>share driver expression</b>	In PeopleSoft Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.
<b>single signon</b>	With single signon, users can, after being authenticated by a PeopleSoft application server, access a second PeopleSoft application server without entering a user ID or password.
<b>source transaction</b>	In commitment control, any transaction generated in a PeopleSoft or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.
<b>SpeedChart</b>	A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.
<b>SpeedType</b>	A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.
<b>staging</b>	A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.

<b>statutory account</b>	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.
<b>step</b>	In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.
<b>storage level</b>	In PeopleSoft Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.
<b>subcustomer qualifier</b>	A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.
<b>Summary ChartField</b>	You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).
<b>summary ledger</b>	An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.
<b>summary time period</b>	In PeopleSoft Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.
<b>summary tree</b>	A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the <i>basis</i> tree). A summary tree structure specifies the details on which the summary trees are to be built.
<b>syndicate</b>	To distribute a production version of the enterprise catalog to partners.
<b>system function</b>	In PeopleSoft Receivables, an activity that defines how the system generates accounting entries for the general ledger.
<b>TableSet</b>	A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.
<b>TableSet sharing</b>	Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.
<b>target currency</b>	The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.
<b>template</b>	A template is HTML code associated with a web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.
<b>territory</b>	In PeopleSoft Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.
<b>TimeSpan</b>	A relative period, such as year-to-date or current period, that can be used in various PeopleSoft General Ledger functions and reports when a rolling time frame, rather

	than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Projects.
<b>trace usage</b>	In PeopleSoft Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.
<b>transaction allocation</b>	In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.
<b>transaction state</b>	In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and “picked up” by a different section for further processing.
<b>Translate table</b>	A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.
<b>tree</b>	The graphical hierarchy in PeopleSoft systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.
<b>unclaimed transaction</b>	In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.
<b>universal navigation header</b>	Every PeopleSoft portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.
<b>user interaction object</b>	In PeopleSoft Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).
<b>variable</b>	In PeopleSoft Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.
<b>VAT exception</b>	Abbreviation for <i>value-added tax exception</i> . A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.
<b>VAT exempt</b>	Abbreviation for <i>value-added tax exempt</i> . Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.
<b>VAT exoneration</b>	Abbreviation for <i>value-added tax exoneration</i> . An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.
<b>VAT suspension</b>	Abbreviation for <i>value-added tax suspension</i> . An organization that has been granted a temporary exemption from paying VAT.
<b>warehouse</b>	A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.

<b>work order</b>	In PeopleSoft Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.
<b>worksheet</b>	A way of presenting data through a PeopleSoft Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.
<b>worklist</b>	The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.
<b>XML schema</b>	An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.
<b>yield by operation</b>	In PeopleSoft Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.
<b>zero-rated VAT</b>	Abbreviation for <i>zero-rated value-added tax</i> . A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.



# Index

## A

Activities page 31  
activity ID templates 31  
Add/Remove from My Proposals page 61–62  
adding  
    customers 29  
    project roles and rates 30  
    proposal contacts 30  
    proposal planners 30  
additional documentation x  
Additional Information for CRM page 63  
adjustments, entering 36  
analysis types 42  
application fundamentals ix  
application messages  
    installation 92  
    proposal integration 89  
    quote integration 91  
    sales integration 91  
application module requirements 6  
approving the billing worksheet 85  
Attachments page 51, 58  
attachments, adding 36, 58

## B

BIIVC000 process 86  
bill rate adjustments 55  
billing  
    process overview 82  
    running the finalization process 86  
    system preparation 81  
    understanding the process 81  
Billing - General Options page 18  
billing business unit 22  
billing information, entering 35  
Billing Interface process 82, 85  
billing interface tables 39  
billing plans 39  
billing worksheet  
    approving 85  
    canceling 82  
    deleting 85  
bills, real 82  
BIPCC000 process 86

BU Definition page 16  
BU Options page 16  
Budget Detail page 42  
budget generation 42  
budget item types 32  
Budget Item Types page 31–32  
budget items 32  
Budget Items page 31–32  
budget options 49  
business processes 5  
business units  
    contracts 16  
    defining 19  
    dependency 20  
    project costing 16  
    understanding 15

## C

CA\_BI\_INTFC process 40, 82  
CA\_BP\_XREF table 83  
comments, submitting xiii  
commitment control 18  
common elements xiii  
component interfaces  
    ACCOUNT\_CF 7  
    ALTACCT\_CF 7  
    BUDGET\_REF 7  
    BUDGET\_SCENARIO 10  
    CHARTFIELD1 8  
    CHARTFIELD2 8  
    CHARTFIELD3 8  
    CLASS\_CF 8  
    CONTACT 8  
    CUSTOMER\_BILLTO\_CI 9  
    CUSTOMER\_GROUP 8  
    CUSTOMER\_MAIN\_CI 9  
    CUSTOMER\_MISC\_CI 9  
    CUSTOMER\_SHIPTO\_CI 9  
    CUSTOMER\_SOLDTO\_CI 9  
    DEPT\_CF 8  
    EM\_BUS\_UNIT\_LED 9  
    FUND\_CF 9  
    IU\_INTER\_PR\_BASIC 9  
    IU\_INTER\_TMPLT 9  
    IU\_INTRA\_TMPLT 9

**MEMBER\_PERSON1\_CI** 11  
**MEMBER\_TYPE\_TABLE\_CI** 11  
**OPER\_UNIT\_CF** 10  
**OPR\_DEFAULT\_FIN** 11  
**PRODUCT\_CF** 10  
**PROGRAM\_CF** 10  
**PROJECT\_CF** 10  
**STATISTICS\_CODE** 10  
**TAX\_BU\_CODE\_VAT** 11  
**TAX\_CODE\_VAT** 11  
**TEAM\_MEMBER\_TABLE\_CI** 10  
**TR\_BANK\_BRANCH\_CI** 7  
**VAT\_DEF\_CI** 11  
**VAT\_ENTITY\_ID** 11  
Confidence Level Setup page 20, 23  
confidence levels, defining 19, 23  
confidence percentage 45  
Consolidated Publications Incorporated (CPI) x  
contact information xiii  
contacts 30  
contract general 39  
contract generation  
  process 36, 38  
  understanding 37  
Contract Generation process 19  
contract legal entity 22  
contract lines 16, 39  
Contracts BU Setup page 16, 20, 22  
Contracts business unit 16  
contracts business unit defaults 22  
Contracts/Billing Interface process 40, 82, 85  
Contracts/Billing Interface Xref table 83  
copy project 52  
Copy Project page 65  
Copy Proposal page 68  
Copy Version page 67  
copying  
  projects 65  
  proposal information 68  
  proposal versions 67  
country-specific documentation xii  
CRM Information, viewing 63  
cross-references xii  
Current Bill Rate page 51, 55  
Customer Connection web site x  
Customer Relationship Management (CRM) 44  
customers, adding 29

**D**

defaults, establishing 19  
deferred processing xv  
deferred revenue accounting 86  
defining  
  activity ID templates 31  
  budget item types 32  
  budget items 32  
  confidence levels 19, 23  
  contracts business unit defaults 22  
  key words 33  
  proposal billing options and security 49  
  proposal management defaults 20  
  proposal time defaults 48  
  time and resource estimates 52  
Delete Utilities Tables page 19  
documentation  
  country-specific xii  
  printed x  
  related x  
  updates x  
double-sided transactions 95

**E**

embedded analytics 2  
employee IDs 26  
ESA\_PROPOSAL\_PRICE application message 91  
Excel to Component Interface utility 7  
expense detail 57  
Expense Estimate page 51, 56  
expense estimates 50  
expense estimates, creating 56  
expense information 36

**F**

fields, common descriptions xvi  
finalization process, billing 86  
fixed amount product 23

**G**

generate status 45  
glossary 101  
GM\_ACTIVITY\_PM page 31  
GM\_ADJUSTB\_SECPNL page 55  
GM\_BU\_CONF\_SETUP page 23  
GM\_BU\_PM\_SETUP page 22  
GM\_BUD\_CAT\_TYPE page 32  
GM\_BUD\_ITEMS page 32

GM\_BUD\_PPSL\_CPY page 65, 67–68  
 GM\_MY\_PROPOSAL page 61  
 GM\_MYOPP\_ADD page 62  
 GM\_OPPTY\_DOC1 page 58  
 GM\_OPPTY\_DTL page 52  
 GM\_OPPTY\_DTL\_EX page 56  
 GM\_OPPTY\_HDR page 43  
 GM\_OPPTY\_HDR\_CRM page 63  
 GM\_OPPTY\_HDR\_HRS page 48  
 GM\_OPPTY\_HDR\_SEC page 49  
 GM\_OPPTY\_KEYWORD page 59  
 GM\_OPPTY\_PRJCT\_CTL page 57  
 GM\_OPPTY\_SUMMARY page 60  
 GM\_PM\_BU\_PC page 20  
 GM\_PROP\_CTR\_KEY page 33  
 GM\_PROPOSAL\_INQ page 74

**I**  
 implementation 7  
 incoming transactions, controlling 78  
 installation component 18  
 installation options 17–18  
 Installation Options - Contracts page 18  
 Installed Products page 18  
 integration template 15, 21  
 integrations 6  
     PeopleSoft Commitment Control 95  
     PeopleSoft Contracts 93  
     PeopleSoft Customer Relationship Management 89  
     PeopleSoft General Ledger 94  
     PeopleSoft Inventory 97  
     PeopleSoft Payables 97  
     PeopleSoft Project Costing 93  
     PeopleSoft Purchasing 96  
     PeopleSoft Receivables 95  
     PeopleSoft Time & Labor 94  
     process flows 87  
     third-party systems 97  
 INTFC\_BI process 82

**K**  
 key words 33  
 key words adding 36  
 key words, adding 59  
 KeyWords page 51, 59

**L**  
 limit access to proposals 25

**M**  
 Maintain Proposal page 43  
 mark downs 42  
 MDY (days) 33  
 MHR (hours) 33  
 minimum bill amount 22  
 MMO (months) 33  
 MWK (weeks) 33  
 My Proposals page 61

**N**  
 navigation 13  
 notes xii

**O**  
 OC\_ESA\_PROPOSAL application message 89  
 OC\_ESA\_PROPOSAL\_RESPONSE application message 89  
 OC\_ESA\_PROPOSAL\_STATUS application message 91  
 operational structure, defining 15  
 operational summary, proposal 4

**P**  
 PeopleBooks  
     ordering x  
 PeopleCode, typographical conventions xi  
 PeopleSoft application fundamentals ix  
 permission lists 25  
 PM1100 report 99  
 PM1110 report 99  
 PM1120 report 99  
 PM1200 report 100  
 PM1210 report 100  
 PM1310 report 100  
 PM1400 report 100  
 PM1410 report 100  
 PMR analysis type 42  
 pre-spending 38, 46  
 prerequisites ix  
 pricing method 53  
 printed documentation x  
 procurement process 96  
 Product Definition - Contracts Options page 17  
 Product Definition page 39  
 products

- fixed amount 17
- rate based 17
- understanding 16
- PROJ\_RESOURCE table 77, 83
- project control 77
- project control details, entering 57
- Project Control page 51, 57
- Project Costing BU Setup page 16
- Project Costing business unit 16
- Project Costing Definition page 16
- Project Costing Options page 16
- project delete utility 19, 37
- Project Integration page 18
- project roles and rates 30
- project team, create 53
- project teams, understanding 37
- projects
  - administering 77
  - analysis inquiries 79
  - analyzing 78
  - defining 77
  - setting up 77
  - transaction review 79
- projects and activities 41
- Projects BU page 20
- projects, copying 65
- Projects/Contracts Interface process 86
- proposal
  - generate 35
  - prepare 35
- proposal billing options and security 49
- proposal contacts 30
- proposal information, copying 68
- Proposal Inquiry page 74
- Proposal Key Words page 31, 33
- proposal management
  - business processes 5
  - implementation 7
  - integrations 6
  - navigating in 13
  - overview 1
- Proposal Management Center page 2
- proposal management defaults 20
- proposal management information, establishing 31
- proposal planners 30
- proposal preparation process, understanding 35
- Proposal Reports page 71–72
- proposal time defaults 48
- proposal version, new 36
- proposal versions, copying 67
- proposals
  - adding and removing 62
  - expense summary 47
  - generation 43
  - overall summary 46
  - preparation 43
  - status 44
  - time summary 47
  - viewing 61

## R

- rate based product 23
- rate options 50
- rate templates 41
- related documentation x
- reports
  - by confidence in quartile 100
  - by confidence in tenths 100
  - by customer name 100
  - by status 100
  - fixed fee 99
  - fixed fee itemized 99
  - generating 71
  - internal 99
  - pipeline 72
  - proposal 72
  - resource demand 73
  - resource demand by role 100
  - understanding 71
- resource demand pagelet 4
- Resource Demand Report page 73
- retrieving proposal information 74
- revenue pipeline analytic 3
- Revenue Pipeline Reports page 72
- revenue recognition plans 40
- RUN\_GM\_PL\_RPT page 72
- RUN\_GM\_PROP\_RPT page 72
- RUN\_GM\_RES\_RPT page 73

## S

- search records 26
- search records, security 26
- security
  - by department ID 26
  - by user ID 26
  - multilevel 25
  - understanding 25

service order, create 54  
 Set Up Options page 48–49  
 setup manager 7  
 single-sided transactions 94  
 source criteria 42  
 statuses  
   customer relationship management 92  
   proposal management 92  
 structure, understanding 29  
 suggestions, submitting xiii  
 Summary page 52, 60

**T**

target definition 42  
 temporary bills 82  
 terms 101  
   account xvi  
   activity xvi  
   analysis type xvi  
   currency xvi  
   department xvi  
   detID xvii  
   effective date xvi  
   EIP xvi  
   operating unit xvi  
   process monitor xvi  
   product xvi  
   program xvi  
   project xvi  
   proposal xvii  
   proposal ID xvii  
   report ID xvii  
   resource transaction xvii  
   resource type xvii  
   run xvii  
   run control ID xvii  
   status xvii  
   version xvii  
 time  
   calculate 35  
   estimates 35, 50  
 time and expense summary, viewing 60  
 time and resource estimates 52  
 Time Configuration page 48  
 Time Estimate page 51–52  
 trees  
   department 26  
   node-oriented 26  
   Proposal Management security 26  
 typographical conventions xi

**U**

unit of measure 33  
 user roles 25

**V**

visual cues xii

**W**

warnings xiii



# PeopleSoft®

---

## PeopleSoft Proposal Management 8.8 Reports

---

**December 2003**

## PeopleSoft Proposal Management 8.8 Reports

SKU FSCM88PMT-R 1203

Copyright © 1992-2003 PeopleSoft, Inc. All rights reserved.

All material contained in this documentation is proprietary and confidential to PeopleSoft, Inc. ("PeopleSoft"), protected by copyright laws and subject to the nondisclosure provisions of the applicable PeopleSoft agreement. No part of this documentation may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, including, but not limited to, electronic, graphic, mechanical, photocopying, recording, or otherwise without the prior written permission of PeopleSoft.

This documentation is subject to change without notice, and PeopleSoft does not warrant that the material contained in this documentation is free of errors. Any errors found in this document should be reported to PeopleSoft in writing.

The copyrighted software that accompanies this document is licensed for use only in strict accordance with the applicable license agreement which should be read carefully as it governs the terms of use of the software and this document, including the disclosure thereof.

PeopleSoft, PeopleTools, PS/nVision, PeopleCode, PeopleBooks, PeopleTalk, and Vantive are registered trademarks, and Pure Internet Architecture, Intelligent Context Manager, and The Real-Time Enterprise are trademarks of PeopleSoft, Inc. All other company and product names may be trademarks of their respective owners. The information contained herein is subject to change without notice.

### Open Source Disclosure

PeopleSoft takes no responsibility for its use or distribution of any open source or shareware software or documentation and disclaims any and all liability or damages resulting from use of said software or documentation. The following open source software may be used in PeopleSoft products and the following disclaimers are provided.

Apache Software Foundation

This product includes software developed by the Apache Software Foundation (<http://www.apache.org/>). Copyright (c) 1999-2000 The Apache Software Foundation. All rights reserved.

THIS SOFTWARE IS PROVIDED "AS IS" AND ANY EXPRESSED OR IMPLIED WARRANTIES, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE ARE DISCLAIMED. IN NO EVENT SHALL THE APACHE SOFTWARE FOUNDATION OR ITS CONTRIBUTORS BE LIABLE FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, EXEMPLARY, OR CONSEQUENTIAL DAMAGES (INCLUDING, BUT NOT LIMITED TO, PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES; LOSS OF USE, DATA, OR PROFITS; OR BUSINESS INTERRUPTION) HOWEVER CAUSED AND ON ANY THEORY OF LIABILITY, WHETHER IN CONTRACT, STRICT LIABILITY, OR TORT (INCLUDING NEGLIGENCE OR OTHERWISE) ARISING IN ANY WAY OUT OF THE USE OF THIS SOFTWARE, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGE.

OpenSSL

Copyright (c) 1998-2003 The OpenSSL Project. All rights reserved.

THIS SOFTWARE IS PROVIDED BY THE OpenSSL PROJECT "AS IS" AND ANY EXPRESSED OR IMPLIED WARRANTIES, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE ARE DISCLAIMED. IN NO EVENT SHALL THE OpenSSL PROJECT OR ITS CONTRIBUTORS BE LIABLE FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, EXEMPLARY, OR CONSEQUENTIAL DAMAGES (INCLUDING, BUT NOT LIMITED TO, PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES; LOSS OF USE, DATA, OR PROFITS; OR BUSINESS INTERRUPTION) HOWEVER CAUSED AND ON ANY THEORY OF LIABILITY, WHETHER IN CONTRACT, STRICT LIABILITY, OR TORT (INCLUDING NEGLIGENCE OR OTHERWISE) ARISING IN ANY WAY OUT OF THE USE OF THIS SOFTWARE, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGE.

SSLeay

Copyright (c) 1995-1998 Eric Young. All rights reserved.

THIS SOFTWARE IS PROVIDED BY ERIC YOUNG "AS IS" AND ANY EXPRESS OR IMPLIED WARRANTIES, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE ARE DISCLAIMED. IN NO EVENT SHALL THE AUTHOR OR CONTRIBUTORS BE LIABLE FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, EXEMPLARY, OR CONSEQUENTIAL DAMAGES (INCLUDING, BUT NOT LIMITED TO, PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES; LOSS OF USE, DATA, OR PROFITS; OR BUSINESS INTERRUPTION) HOWEVER CAUSED AND ON ANY THEORY OF LIABILITY, WHETHER IN CONTRACT, STRICT LIABILITY, OR TORT (INCLUDING NEGLIGENCE OR OTHERWISE) ARISING IN ANY WAY OUT OF THE USE OF THIS SOFTWARE, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGE.

Loki Library

Copyright (c) 2001 by Andrei Alexandrescu. This code accompanies the book:

Alexandrescu, Andrei. "Modern C++ Design: Generic Programming and Design Patterns Applied". Copyright (c) 2001. Addison-Wesley. Permission to use, copy, modify, distribute and sell this software for any purpose is hereby granted without fee, provided that the above copyright notice appear in all copies and that both that copyright notice and this permission notice appear in supporting documentation.

# Contents

## Reports Preface

<b>About This PeopleBook .....</b>	<b>v</b>
Related Documentation.....	v
Obtaining Documentation Updates.....	v
Ordering Printed Documentation.....	v
Comments and Suggestions.....	vi

## Chapter 1

<b>PeopleSoft Proposal Management Reports.....</b>	<b>1</b>
PeopleSoft Proposal Management Reports: A to Z.....	1
PeopleSoft Proposal Management Proposal Reports.....	1
PeopleSoft Proposal Management Resource Demand Report.....	1
PeopleSoft Proposal Management Revenue Pipeline Reports.....	2

## Chapter 2

<b>Report Samples.....</b>	<b>3</b>
----------------------------	----------



# About This PeopleBook

PeopleBooks provide you with the information that you need to implement and use PeopleSoft applications.

This preface discusses:

- Related documentation.
- Comments and suggestions.

---

## Related Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

## Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on the PeopleSoft Customer Connection web site. Through the Documentation section of PeopleSoft Customer Connection, you can download files to add to your PeopleBook Library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM.

---

**Important!** Before you upgrade, you must check PeopleSoft Customer Connection for updates to the upgrade instructions. PeopleSoft continually posts updates as the upgrade process is refined.

---

### See Also

PeopleSoft Customer Connection web site, <http://www.peoplesoft.com/corp/en/login.asp>

## Ordering Printed Documentation

You can order printed, bound volumes of the complete PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM. PeopleSoft makes printed documentation available for each major release shortly after the software is shipped. Customers and partners can order printed PeopleSoft documentation by using any of these methods:

- Web
- Telephone
- Email

## **Web**

From the Documentation section of the PeopleSoft Customer Connection web site, access the PeopleSoft Press web site under the Ordering PeopleBooks topic. The PeopleSoft Press web site is a joint venture between PeopleSoft and Consolidated Publications Incorporated (CPI), the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

## **Telephone**

Contact CPI at 800 888 3559.

## **Email**

Send email to CPI at [psoftpress@cc.larwood.com](mailto:psoftpress@cc.larwood.com).

## **See Also**

PeopleSoft Customer Connection web site, <http://www.peoplesoft.com/corp/en/login.asp>

---

## **Comments and Suggestions**

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about PeopleBooks and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft Product Documentation Manager PeopleSoft, Inc. 4460 Hacienda Drive Pleasanton, CA 94588

Or send email comments to [doc@peoplesoft.com](mailto:doc@peoplesoft.com).

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

# CHAPTER 1

## PeopleSoft Proposal Management Reports

This appendix provides an overview of PeopleSoft Proposal Management reports and enables you to view a summary table of all reports.

---

**Note.** For samples of these reports, see the Portable Document Format (PDF) files that are published on CD-ROM with your documentation.

---

### PeopleSoft Proposal Management Reports: A to Z

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

#### PeopleSoft Proposal Management Proposal Reports

Report ID and Report Name	Description	Navigation	Run Control Page
PM1100 Fixed Fee	Review proposed time and expenses for a particular proposal.	Proposal Management, Reports, Proposal Reports	RUN_GM_PROP_RPT
PM1110 Fixed Fee Itemized	Review proposed time and expenses for a particular proposal, including adjustments.	Proposal Management, Reports, Proposal Reports	RUN_GM_PROP_RPT
PM1120 Internal	Review proposed time and expenses 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 Tenth	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

## CHAPTER 2

# Report Samples

This chapter provides report samples.

For the online samples of these reports, see the PDF files that are published on CD-ROM with your online documentation.



Report ID: PM1100  
 User ID : VP1  
 Run Control: PROP\_RPT

PeopleSoft Proposal Management

**Proposal: Fixed Fee**

Page No. 1  
 Run Date 11/29/2003  
 Run Time 10:43:05 AM

<u>Business Unit</u>	US001	US001 NEW YORK OPERATIONS
<u>Proposal:</u>	CON000200000002	Sample PM Proposal 2
<u>Version:</u>	V101	With testing 2
<u>Customer:</u>	1000	Alliance Group

**Project:** 0000000137 Planning Phase 2

**Time**

<b>Activity</b>	<b>Project Role</b>	<b>Quantity</b>
IMPLEMENTATION	Current Project Manager	1.00
	Project Worker	2.00
PC IMPLEMENT	Project Administrator	2.00
	Project Consultant	4.00

**Expense**

<b>Activity</b>	<b>Expense Description</b>	<b>Quantity</b>
IMPLEMENTATION	Administration	1.00
PC IMPLEMENT	Travel to customer site	4.00
	Onsite lodging (per night)	80.00
	Car	80.00

<b>Project Proposed Time Total:</b>	<b>339,680.00</b>
<b>Project Proposed Expense Total:</b>	<b>32,500.00</b>

**Project:** 0000000138 Implementation Phase 2

**Time**

<b>Activity</b>	<b>Project Role</b>	<b>Quantity</b>
IMPLEMENTATION	Current Project Manager	1.00
	Project Worker	2.00

**Expense**

<b>Activity</b>	<b>Expense Description</b>	<b>Quantity</b>
IMPLEMENTATION	Administration	1.00

<b>Project Proposed Time Total:</b>	<b>107,360.00</b>
<b>Project Proposed Expense Total:</b>	<b>12,500.00</b>

Project : 0000000138 Testing Phase 2

Project		0000000139	Testing Phase 2	
Time				
Activity		Project Role	Quantity	
TESTING		Current Project Manager	1.00	
		Project Worker	2.00	
Expense				
Activity		Expense Description	Quantity	
TESTING		Administration	1.00	
				<b>Project Proposed Time Total: 107,360.00</b>
				<b>Project Proposed Expense Total: 12,500.00</b>
<b>Grand Total:</b>	<b>Proposed Time</b>	<b>Proposed Expense</b>	<b>Proposed Total</b>	
	554,400.00	57,500.00	611,900.00	



Report ID: PM1110  
 User ID : VP1  
 Run Control: PROP\_RPT

PeopleSoft Proposal Management  
**Proposal: Fixed Fee Itemized**

Page No. 1  
 Run Date 11/29/2003  
 Run Time 10:43:08 AM

<b>Business Unit:</b>	US001	US001 NEW YORK OPERATIONS
<b>Proposal:</b>	CON000200000002	Sample PM Proposal 2
<b>Version:</b>	V101	With testing 2
<b>Customer:</b>	1000	Alliance Group

**Project:** 0000000137 Planning Phase 2

**Time**

Activity	Project Role	Quantity	Amount
IMPLEMENTATION	Current Project Manager	1.00	49,600.00
	Project Worker	2.00	48,000.00
PC IMPLEMENT	Project Administrator	2.00	19,200.00
	Project Consultant	4.00	192,000.00
<b>Subtotal:</b>			<b>308,800.00</b>

**Expense**

Activity	Expense Description	Quantity	Amount
IMPLEMENTATION	Administration	1.00	10,000.00
PC IMPLEMENT	Travel to customer site	4.00	4,000.00
	Onsite lodging (per night)	80.00	8,000.00
	Car	80.00	4,000.00
<b>Subtotal:</b>			<b>26,000.00</b>

<b>Project Time Total:</b>	<b>308,800.00</b>
<b>Project Time Adjustment:</b>	<b>30,880.00</b>
<b>Project Proposed Time Total:</b>	<b>339,680.00</b>
<b>Project Expense Total:</b>	<b>26,000.00</b>
<b>Project Expense Adjustment:</b>	<b>6,500.00</b>
<b>Project Proposed Expense Total:</b>	<b>32,500.00</b>

**Project:** 0000000138 Implementation Phase 2

**Time**

Activity	Project Role	Quantity	Amount
IMPLEMENTATION	Current Project Manager	1.00	49,600.00
	Project Worker	2.00	48,000.00

Project Worker	2.00	40,000.00
<b>Subtotal:</b>	<b>97,600.00</b>	

**Expense**

Activity	Expense Description	Quantity	Amount
IMPLEMENTATION	Administration	1.00	10,000.00
			<b>Subtotal:</b> <b>10,000.00</b>
			<b>Project Time Total:</b> <b>97,600.00</b>
			<b>Project Time Adjustment:</b> <b>9,760.00</b>
			<b>Project Proposed Time Total:</b> <b>107,360.00</b>
			<b>Project Expense Total:</b> <b>10,000.00</b>
			<b>Project Expense Adjustment:</b> <b>2,500.00</b>
			<b>Project Proposed Expense Total:</b> <b>12,500.00</b>



Report ID: PM1110  
 User ID: VP1  
 Run Control: PROP\_RPT

PeopleSoft Proposal Management

Page No. 2  
 Run Date 11/29/2003  
 Run Time 10:43:08 AM

<u>Business Unit:</u>	US001	US001 NEW YORK OPERATIONS
<u>Proposal:</u>	CON000200000002	Sample PM Proposal 2
<u>Version:</u>	V101	With testing 2
<u>Customer:</u>	1000	Alliance Group

<b>Project:</b>	0000000139	Testing Phase 2
-----------------	------------	-----------------

**Time**

Activity	Project Role	Quantity	Amount
TESTING	Current Project Manager	1.00	49,600.00
	Project Worker	2.00	48,000.00
			<b>Subtotal:</b> <b>97,600.00</b>

**Expense**

Activity	Expense Description	Quantity	Amount
TESTING	Administration	1.00	10,000.00

TESTING	Administration	1.00	10,000.00
<b>Subtotal:</b>			<b>10,000.00</b>
Project Time Total:		97,600.00	
Project Time Adjustment:		9,760.00	
Project Proposed Time Total:		107,360.00	
Project Expense Total:		10,000.00	
Project Expense Adjustment:		2,500.00	
Project Proposed Expense Total:		12,500.00	



Report ID: PM1110  
User ID : VP1  
Run Control: PROP\_RPT

PeopleSoft Proposal Management  
**Proposal: Fixed Fee Itemized**

Page No. 3  
Run Date 11/29/2003  
Run Time 10:43:08 AM

<b>Business Unit:</b>	US001	US001 NEW YORK OPERATIONS
<b>Proposal:</b>	CON000200000002	Sample PM Proposal 2
<b>Version:</b>	V101	With testing 2
<b>Customer:</b>	1000	Alliance Group

<b>Total Time:</b>	<b>504,000.00</b>
<b>Total Time Adjustment:</b>	<b>50,400.00</b>
<b>Total Proposed Time:</b>	<b>554,400.00</b>
<b>Total Expense:</b>	<b>46,000.00</b>
<b>Total Expense Adjustment:</b>	<b>11,500.00</b>
<b>Total Proposed Expense:</b>	<b>57,500.00</b>
<b>Total Proposed Total:</b>	<b>611,900.00</b>



Report ID: PM1120  
 User ID : VP1  
 Run Control: PROP\_RPT

PeopleSoft Proposal Management

Page No. 1  
 Run Date 11/29/2003  
 Run Time 10:43:10 AM

Proposal: Internal

<u>Business Unit:</u>	US001	US001 NEW YORK OPERATIONS
<u>Proposal:</u>	CON000200000002	Sample PM Proposal 2
<u>Version:</u>	V101	With testing 2
<u>Customer:</u>	1000	Alliance Group

**Project:** 0000000137 Planning Phase 2

**Time**

Activity	Project Role	Quantity	Bill Amount	Cost Amount	Margin
IMPLEMENTATION	Current Project Manager	1.00	49,600.00	28,800.00	41.94
	Project Worker	2.00	48,000.00	40,800.00	15.00
PC IMPLEMENT	Project Administrator	2.00	19,200.00	10,800.00	43.75
	Project Consultant	4.00	192,000.00	70,400.00	63.33
		<b>Subtotal:</b>	<b>308,800.00</b>	<b>150,800.00</b>	

**Expense**

Activity	Expense Description	Quantity	Bill Amount	Cost Amount	Margin
IMPLEMENTATION	Administration	1.00	10,000.00	10,000.00	0.00
	Travel to customer site	4.00	4,000.00	4,000.00	0.00
PC IMPLEMENT	Onsite lodging (per night)	80.00	8,000.00	8,000.00	0.00
	Car	80.00	4,000.00	4,000.00	0.00
		<b>Subtotal:</b>	<b>26,000.00</b>	<b>26,000.00</b>	

<b>Project Time Total:</b>	<b>308,800.00</b>	<b>150,800.00</b>
<b>Project Time Adjustment:</b>	<b>30,880.00</b>	
<b>Project Proposed Time Total:</b>	<b>339,680.00</b>	<b>55.61</b>
<b>Project Expense Total:</b>	<b>26,000.00</b>	<b>26,000.00</b>
<b>Project Expense Adjustment:</b>	<b>6,500.00</b>	
<b>Project Proposed Expense Total:</b>	<b>32,500.00</b>	<b>20.00</b>

**Project:** 0000000138 Implementation Phase 2

**Time**

Activity	Project Role	Quantity	Bill Amount	Cost Amount	Margin
IMPLEMENTATION	Current Project Manager	1.00	49,600.00	28,800.00	41.94
	Project Worker	2.00	48,000.00	40,800.00	15.00

Subtotal: 97,600.00 69,600.00

## Expense

Activity	Expense Description	Quantity	Bill Amount	Cost Amount	Margin
IMPLEMENTATION	Administration	1.00	10,000.00	10,000.00	0.00
		Subtotal:	10,000.00	10,000.00	
		Project Time Total:	97,600.00	69,600.00	
		Project Time Adjustment:	9,760.00		
		Project Proposed Time Total:	107,360.00		35.17
		Project Expense Total:	10,000.00	10,000.00	
		Project Expense Adjustment:	2,500.00		
		Project Proposed Expense Total:	12,500.00		20.00



Report ID: PM1120  
 User ID: VP1  
 Run Control: PROP\_RPT

PeopleSoft Proposal Management  
 Proposal: Internal

Page No. 2  
 Run Date 11/29/2003  
 Run Time 10:43:10 AM

<u>Business Unit:</u>	US001	US001 NEW YORK OPERATIONS
<u>Proposal:</u>	CON000200000002	Sample PM Proposal 2
<u>Version:</u>	V101	With testing 2
<u>Customer:</u>	1000	Alliance Group

Project: 0000000139 Testing Phase 2

## Time

Activity	Project Role	Quantity	Bill Amount	Cost Amount	Margin
TESTING	Current Project Manager	1.00	49,600.00	28,800.00	41.94
	Project Worker	2.00	48,000.00	40,800.00	15.00
		Subtotal:	97,600.00	69,600.00	

## Expense

Activity	Expense Description	Quantity	Bill Amount	Cost Amount	Margin
TESTING	Administration	1.00	10,000.00	10,000.00	0.00

	1,000	10,000.00	10,000.00	0.00
<b>Subtotal:</b>		<b>10,000.00</b>	<b>10,000.00</b>	
<b>Project Time Total:</b>		<b>97,600.00</b>	<b>69,600.00</b>	
<b>Project Time Adjustment:</b>		<b>9,760.00</b>		
<b>Project Proposed Time Total:</b>		<b>107,360.00</b>		<b>35.17</b>
<b>Project Expense Total:</b>		<b>10,000.00</b>	<b>10,000.00</b>	
<b>Project Expense Adjustment:</b>		<b>2,500.00</b>		
<b>Project Proposed Expense Total:</b>		<b>12,500.00</b>		<b>20.00</b>



Report ID: PM1120  
 User ID : VP1  
 Run Control: PROP\_RPT

PeopleSoft Proposal Management

Proposal: Internal

Page No. 3  
 Run Date 11/29/2003  
 Run Time 10:43:10 AM

<u>Business Unit:</u>	US001	US001 NEW YORK OPERATIONS
<u>Proposal:</u>	CON000200000002	Sample PM Proposal 2
<u>Version:</u>	V101	With testing 2
<u>Customer:</u>	1000	Alliance Group

<b>Total Time:</b>	<b>504,000.00</b>
<b>Total Time Adjustment:</b>	<b>50,400.00</b>
<b>Total Proposed Time:</b>	<b>554,400.00</b>
<b>Total Time Cost:</b>	<b>290,000.00</b>
<b>Time Margin:</b>	<b>47.69</b>
<b>Total Expense:</b>	<b>46,000.00</b>
<b>Total Expense Adjustment:</b>	<b>11,500.00</b>
<b>Total Proposed Expense:</b>	<b>57,500.00</b>
<b>Total Expense Cost:</b>	<b>46,000.00</b>
<b>Expense Margin:</b>	<b>20.00</b>
<b>Total Proposed Total:</b>	<b>611,900.00</b>



Report ID: PM1310  
User ID :  
Run Control:

PeopleSoft Proposal Management  
**Resource Demand: By Role**

Page No. 1  
Run Date 11/29/2003  
Run Time 10:58:43 AM

Business Unit:  
Status :

Confidence: TO  
Date Range : TO

---

<u>Project Role</u>	<u>Avg Bill Rate</u>	<u>Avg Cost Rate</u>	<u>Margin</u>	<u>Quantity</u>
---------------------	----------------------	----------------------	---------------	-----------------

---

<u>Overall Avg Bill Rate</u>	<u>Overall Avg Cost Rate</u>	<u>Avg. Margin</u>	<u>Total</u>
------------------------------	------------------------------	--------------------	--------------



Report ID: PM1200  
 User ID : VP1  
 Run Control: PROP\_RPT

PeopleSoft Proposal Management  
**Revenue Pipeline Report: By Confidence in Tents**

Page No. 1  
 Run Date 11/29/2003  
 Run Time 10:52:12 AM

<b>Business Unit:</b>	US001	US001 NEW YORK OPERATIONS	<b>Status:</b>	Committed		
<b>Customer:</b>	ALL	All	<b>Confidence:</b>	1	TO	100
<b>Proposal Contact:</b>	ALL	All	<b>Proposal Target Due Date:</b>	1/1/2003	TO	12/31/2003

**US Dollar**

Confidence Range: 71 - 80

Customer	Proposal	Version	Proposed Amount	Cost Amount	Margin
Alliance Group	CON000200000002	V101	611,900.00	336,000.00	45.09
	CON000200000003	V101	611,900.00	336,000.00	45.09
		<b>Subtotal:</b>	<b>1,223,800.00</b>	<b>672,000.00</b>	<b>45.09</b>
		<b>Total:</b>	<b>1,223,800.00</b>	<b>672,000.00</b>	<b>45.09</b>
		<b>Total Proposed Amount</b>	<b>Total Cost</b>	<b>Avg. Margin</b>	
		<b>1,223,800.00</b>	<b>672,000.00</b>	<b>45.09</b>	



Report ID: PM1210  
 User ID : VP1  
 Run Control: PROP\_RPT

PeopleSoft Proposal Management  
**Revenue Pipeline Report: By Confidence in Quartile**

Page No. 1  
 Run Date 11/29/2003  
 Run Time 10:52:10 AM

<b>Business Unit:</b>	US001	US001 NEW YORK OPERATIONS	<b>Status:</b>	Committed		
<b>Customer:</b>	ALL	All	<b>Confidence:</b>	1	TO	100
<b>Proposal Contact:</b>	ALL	All	<b>Proposal Target Due Date:</b>	1/1/2003	TO	12/31/2003

**US Dollar**

**Confidence Range:** Fourth Quartile (76 to 100)

Customer	Proposal	Version	Proposed Amount	Cost Amount	Margin
Alliance Group	CON000200000002	V101	611,900.00	336,000.00	45.09
	CON000200000003	V101	611,900.00	336,000.00	45.09
		<b>Subtotal:</b>	1,223,800.00	672,000.00	45.09
		<b>Total:</b>	1,223,800.00	672,000.00	45.09
		<b>Total Proposed Amount</b>	<b>Total Cost</b>	<b>Avg. Margin</b>	
		1,223,800.00	672,000.00	45.09	



Report ID: PM1410  
 User ID : VP1  
 Run Control: PROP\_RPT

PeopleSoft Proposal Management  
**Revenue Pipeline Report: By Status**

Page No. 1  
 Run Date 11/29/2003  
 Run Time 10:52:40 AM

<b>Business Unit:</b>	US001	US001 NEW YORK OPERATIONS	<b>Confidence:</b>	1	TO	100
<b>Customer:</b>	ALL	All	<b>Proposal Target Due Date:</b>	1/1/2003	TO	12/31/2003
<b>Proposal Contact:</b>	ALL	All				

**US Dollar**

**Status:** Committed

Customer	Proposal	Version	Proposed Amount	Cost Amount	Margin
Alliance Group	CON000200000002	V101	611,900.00	336,000.00	45.09
	CON000200000003	V101	611,900.00	336,000.00	45.09
		<b>Subtotal:</b>	1,223,800.00	672,000.00	45.09
		<b>Total:</b>	1,223,800.00	672,000.00	45.09
		<b>Total Proposed Amount</b>	<b>Total Cost</b>	<b>Avg. Margin</b>	
		1,223,800.00	672,000.00	45.09	



Report ID: PM1400  
 User ID : VP1  
 Run Control: PROP\_RPT

PeopleSoft Proposal Management  
**Revenue Pipeline Report: By Customer Name**

Page No. 1  
 Run Date 11/29/2003  
 Run Time 10:52:14 AM

<b>Business Unit:</b>	US001	US001 NEW YORK OPERATIONS	<b>Status:</b>	Committed		
<b>Customer:</b>	ALL	All	<b>Confidence:</b>	1	TO	100
<b>Proposal Contact:</b>	ALL	All	<b>Proposal Target Due Date:</b>	1/1/2003	TO	12/31/2003

**US Dollar**

Customer	Proposal	Version	Proposed Amount	Cost Amount	Margin
Alliance Group	CON000200000002	V101	611,900.00	336,000.00	45.09
	CON000200000003	V101	611,900.00	336,000.00	45.09
		<b>Total:</b>	<b>1,223,800.00</b>	<b>672,000.00</b>	<b>45.09</b>
		<b>Total Proposed Amount</b>	<b>Total Cost</b>	<b>Avg. Margin</b>	
		<b>1,223,800.00</b>	<b>672,000.00</b>	<b>45.09</b>	