PeopleSoft®

PeopleSoft Enterprise Proposal Management 8.9 PeopleBook

July 2005

PeopleSoft Enterprise Proposal Management 8.9 PeopleBook
SKU FSCM89PMT-B 0705
Copyright © 1992-2005, Oracle. All rights reserved.

The Programs (which include both the software and documentation) contain proprietary information; they are provided under a license agreement containing restrictions on use and disclosure and are also protected by copyright, patent, and other intellectual and industrial property laws. Reverse engineering, disassembly, or decompilation of the Programs, except to the extent required to obtain interoperability with other independently created software or as specified by law, is prohibited.

The information contained in this document is subject to change without notice. If you find any problems in the documentation, please report them to us in writing. This document is not warranted to be error-free. Except as may be expressly permitted in your license agreement for these Programs, no part of these Programs may be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose.

If the Programs are delivered to the United States Government or anyone licensing or using the Programs on behalf of the United States Government, the following notice is applicable:

U.S. GOVERNMENT RIGHTS

Programs, software, databases, and related documentation and technical data delivered to U.S. Government customers are "commercial computer software" or "commercial technical data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the Programs, including documentation and technical data, shall be subject to the licensing restrictions set forth in the applicable Oracle license agreement, and, to the extent applicable, the additional rights set forth in FAR 52.227-19, Commercial Computer Software--Restricted Rights (June 1987). Oracle Corporation, 500 Oracle Parkway, Redwood City, CA 94065.

The Programs are not intended for use in any nuclear, aviation, mass transit, medical, or other inherently dangerous applications. It shall be the licensee's responsibility to take all appropriate fail-safe, backup, redundancy and other measures to ensure the safe use of such applications if the Programs are used for such purposes, and we disclaim liability for any damages caused by such use of the Programs.

The Programs may provide links to Web sites and access to content, products, and services from third parties. Oracle is not responsible for the availability of, or any content provided on, third-party Web sites. You bear all risks associated with the use of such content. If you choose to purchase any products or services from a third party, the relationship is directly between you and the third party. Oracle is not responsible for: (a) the quality of third-party products or services; or (b) fulfilling any of the terms of the agreement with the third party, including delivery of products or services and warranty obligations related to purchased products or services. Oracle is not responsible for any loss or damage of any sort that you may incur from dealing with any third party.

Oracle, JD Edwards, PeopleSoft, and Retek are registered trademarks of Oracle Corporation and/or its affiliates. Other names may be trademarks of their respective owners.

Open Source Disclosure

Oracle 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 Oracle's 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 © 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 © 1998-2003 The OpenSSL Project. All rights reserved.

This product includes software developed by the OpenSSL Project for use in the OpenSSL Toolkit (http://www.openssl.org/).

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 © 1995-1998 Eric Young. All rights reserved.

This product includes cryptographic software written by Eric Young (eay@cryptsoft.com). This product includes software written by Tim Hudson (tjh@cryptsoft.com). Copyright © 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 © 2001 by Andrei Alexandrescu. This code accompanies the book: Alexandrescu, Andrei. "Modern C++ Design: Generic Programming and Design Patterns Applied." Copyright © 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.

Helma Project

Copyright © 1999-2004 Helma Project. 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 HELMA 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.

Helma includes third party software released under different specific license terms. See the licenses directory in the Helma distribution for a list of these license.

Sarissa

Copyright © 2004 Manos Batsis.

This library is free software; you can redistribute it and/or modify it under the terms of the GNU Lesser General Public License as published by the Free Software Foundation; either version 2.1 of the License, or (at your option) any later version.

This library is distributed in the hope that it will be useful, but WITHOUT ANY WARRANTY; without even the implied warranty of MERCHANTABILITY or FITNESS FOR A PARTICULAR PURPOSE. See the GNU Lesser General Public License for more details.

You should have received a copy of the GNU Lesser General Public License along with this library; if not, write to the Free Software Foundation, Inc., 59 Temple Place, Suite 330, Boston, MA 02111-1307 USA.

Contents

General Preface
About This PeopleBook Preface xi
PeopleSoft Application Prerequisites..... xi
PeopleSoft Application Fundamentals..... xi
Documentation Updates and Printed Documentation..... xii
Obtaining Documentation Updates..... xii
Ordering Printed Documentation..... xii
Additional Resources..... xiii
Typographical Conventions and Visual Cues..... xiv
Typographical Conventions..... xiv
Visual Cues..... xv
Country, Region, and Industry Identifiers..... xvi
Currency Codes..... xvi
Comments and Suggestions..... xvi
Common Elements Used in PeopleBooks..... xvii

Preface
PeopleSoft Enterprise Proposal Management Preface..... xix
PeopleSoft Products..... xix
Application Fundamentals..... xix
Pages With Deferred Processing..... xx
Common Elements Used in This PeopleBook..... xx

Chapter 1
Getting Started With PeopleSoft Enterprise Proposal Management..... 1
Proposal Management Overview..... 1
Proposal Management Business Processes..... 4
Proposal Management Integrations..... 5
Proposal Management Implementation..... 6

Chapter 2
Navigating in Proposal Management..... 11
Navigating in Proposal Management..... 11

Pages Used to Navigate in Proposal Management.....11

Chapter 3
Defining Your Operational Structure.....13
Understanding Installation Options.....13
Overall Installation Options.....13
Application-Specific Installation Options.....13
Project Delete Utility.....14
Understanding Integration Templates.....14
Understanding Business Unit Default Setup.....15
Project Costing Business Units.....15
Contracts Business Units.....16
Understanding Products.....16
Defining Proposal Management Defaults and Confidence Levels for Business Units.....17
Understanding Proposal Management Defaults and Confidence Levels.....17
Pages Used to Define Proposal Management Defaults and Confidence Levels for the Business Units.....18
Defining Proposal Management Defaults for the Project Costing Business Unit.....18
Defining Contracts Business Unit Defaults for Proposal Management.....19
Defining Confidence Levels for Proposal Management.....21

Chapter 4
Securing Your Proposal Management System.....23
Understanding Proposal Management Security.....23
Multilevel Security.....23
Security by Department and User ID.....24

Chapter 5
Structuring Proposal Management.....27
Understanding Proposal Management Structure.....27
Customer Information.....27
Proposal Contacts.....28
Project Roles and Rates.....28
Proposal Planners.....28
Defining Proposal Management Control Data.....29
Pages Used to Define Proposal Management Control Data.....29
Creating Activity ID Templates.....29

Creating Budget Items.....30
Creating Key Words.....31

Chapter 6
Understanding the Proposal Process.....33
Understanding the Proposal Preparation Process.....33
Understanding Project Teams.....35
Project Teams.....35
Project Delete Utility.....36
Understanding the Generate Process.....36
Pre-Spending.....36
The Generate Process.....37
Contract General Information.....37
Contract Lines.....37
Billing Plans.....38
Revenue Recognition Plans.....38
Projects and Activities.....39
Rate Sets.....39
Budget Generation.....40

Chapter 7
Preparing, Generating, and Viewing Proposal Information.....41
Preparing and Generating Proposal Information.....41
Page Used to Prepare and Generate Proposal Information.....41
Entering Proposal Information.....41
Configuring Labor Defaults, Bill Options, and Security.....46
Pages Used to Configure Labor Defaults, Bill Options, and Security.....46
Configuring Proposal Labor Defaults.....46
Setting Up Proposal Billing Options and Security.....47
Entering Resource Estimates.....48
Pages Used to Enter Labor and Non-Labor Estimates.....49
Entering Resource Estimates.....50
Entering Resource Estimate Details.....51
Entering Resource Notes.....53
Adjusting the Bill Rate.....54
Entering Project Control Details.....55
Adding Attachments.....56
Adding Keywords.....57

Viewing Resource Summary Information.....57
Using the My Proposals Page.....58
Pages Used to View, Add, and Remove Proposals.....59
Viewing Proposal Information.....59
Adding and Removing Proposals.....60
Viewing CRM-Related Information.....60
Page Used to View CRM-Related Information.....61
Viewing CRM-Related Information.....61

Chapter 8
Copying Proposals, Versions, and Projects.....63
Understanding the Copy Functionality in Proposal Management.....63
Copying Proposal Information.....63
Page Used to Copy Proposal Information.....64
Copying Proposal Information.....64
Copying Proposal Versions.....65
Page Used to Copy Proposal Versions.....65
Copying Proposal Versions.....65
Copying Projects.....67
Page Used to Copy Projects.....67
Copying Projects.....67

Chapter 9
Generating Proposal Management Reports.....69
Understanding Proposal Reports.....69
Generating Proposal Reports.....69
Page Used to Generate Proposal Reports.....69
Generating Proposal Reports.....69
Generating Pipeline Reports.....70
Page Used to Generate Pipeline Reports.....70
Generating Pipeline Reports.....70
Generating Labor Resource Reports.....71
Page Used to Generate Labor Resource Reports.....71
Generating Labor Resource Reports.....71
Retrieving Proposal Information.....72
Page Used to Retrieve Proposal Information.....72
Retrieving Proposal Information.....72

Chapter 10
Administering Projects.....75
Understanding How Projects are Used in Proposal Management.....75
Project Control.....75
Transaction Flow Control.....76
Project Analysis.....76
Transaction Review.....77
Analysis Inquiries.....77

Chapter 11
Integrating with Billing.....79
Understanding the Billing Process.....79
System Preparation.....79
Process Overview.....80
The Contracts/Billing Interface Process.....82
The Billing Interface Process.....82
Billing Worksheet Approval.....82
Billing Worksheet Deletion.....82
The Finalization Process.....83
The Projects/Contracts Interface Process.....83
Deferred Revenue Accounting.....83

Chapter 12
Integrating with Other PeopleSoft Applications.....85
Understanding Integration Process Flows.....85
Understanding the Procurement Process.....86
Integrating with PeopleSoft Customer Relationship Management.....87
Integrating with Contracts, Project Costing, and Program Management.....91
Integrating with Time and Labor.....92
Integrating with General Ledger.....93
Integrating with Commitment Control.....94
Integrating with Receivables.....94
Integrating with Purchasing.....94
Integrating with Inventory.....95
Integrating with Payables.....95
Integrating with Third-Party Systems.....95

Appendix A
Proposal Management Reports.....97
Proposal Management Reports: A to Z.....97
Proposal Management Proposal Reports.....97
Proposal Management Resource Demand Report.....97
Proposal Management Revenue Pipeline Reports.....98

Glossary of PeopleSoft Terms.....99

Index 121

About This PeopleBook Preface

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

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Documentation updates and printed documentation.
- Additional resources.
- Typographical conventions and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

Note. PeopleBooks document only page elements, such as fields and check boxes, 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.

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

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft menus, and pages, forms, or windows. 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 applications.

Note. Application fundamentals PeopleBooks are not applicable to the PeopleTools product.

For some applications, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Most PeopleSoft product lines have a version of the application fundamentals PeopleBook. The preface of each PeopleBook identifies the application fundamentals PeopleBooks that are associated with that PeopleBook.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across one or more product lines. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of the appropriate application fundamentals PeopleBooks. They provide the starting points for fundamental implementation tasks.

Documentation Updates and Printed 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 website. 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, https://www.peoplesoft.com/corp/en/login.jsp

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 website, access the PeopleBooks Press website under the Ordering PeopleBooks topic. The PeopleBooks Press website is a joint venture between PeopleSoft and MMA Partners, the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

Telephone

Contact MMA Partners at 877 588 2525.

Email

Send email to MMA Partners at peoplebookspress@mmapartner.com.

See Also

PeopleSoft Customer Connection, https://www.peoplesoft.com/corp/en/login.jsp

Additional Resources

The following resources are located on the PeopleSoft Customer Connection website:

Resource	Navigation
Application maintenance information	Updates + Fixes
Business process diagrams	Support, Documentation, Business Process Maps
Interactive Services Repository	Interactive Services Repository
Hardware and software requirements	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation & Software, Hardware and Software Requirements
Installation guides	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation & Software, Installation Guides and Notes
Integration information	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software, Pre-built Integrations for PeopleSoft Enterprise and PeopleSoft EnterpriseOne Applications
Minimum technical requirements (MTRs) (EnterpriseOne only)	Implement, Optimize + Upgrade, Implementation Guide, Supported Platforms
PeopleBook documentation updates	Support, Documentation, Documentation Updates
PeopleSoft support policy	Support, Support Policy
Prerelease notes	Support, Documentation, Documentation Updates, Category, Prerelease Notes
Product release roadmap	Support, Roadmaps + Schedules
Release notes	Support, Documentation, Documentation Updates, Category, Release Notes

Resource	Navigation
Release value proposition	Support, Documentation, Documentation Updates, Category, Release Value Proposition
Statement of direction	Support, Documentation, Documentation Updates, Category, Statement of Direction
Troubleshooting information	Support, Troubleshooting
Upgrade documentation	Support, Documentation, Upgrade Documentation and Scripts

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.
- Country, region, and industry identifiers.
- Currency codes.

Typographical Conventions

This table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
Italics	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 letter *O*.
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key.
`Monospace font`	Indicates a PeopleCode program or other code example.

Typographical Convention or Visual Cue	Description
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.
. . . (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)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.

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.

If the note is preceded by *Important!,* the note 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.

Cross-References

PeopleBooks provide cross-references either under the heading “See Also” or on a separate line preceded by the word *See.* Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Country, Region, and Industry Identifiers

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

Example of a country-specific heading: "(FRA) Hiring an Employee"

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

Country Identifiers

Countries are identified with the International Organization for Standardization (ISO) country code.

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in PeopleBooks:

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

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

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

Currency Codes

Monetary amounts are identified by the ISO currency code.

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.

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

Common Elements Used in PeopleBooks

As of Date	The last date for which a report or process includes data.
Business Unit	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.
Description	Enter up to 30 characters of text.
Effective Date	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.
Once, Always, and **Don't Run**	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.
Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
Report Manager	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).
Request ID	An ID that represents a set of selection criteria for a report or process.
Run	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.
SetID	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.
Short Description	Enter up to 15 characters of text.
User ID	An ID that represents the person who generates a transaction.

See Also

Enterprise PeopleTools 8.46 PeopleBook: PeopleSoft Process Scheduler

Enterprise PeopleTools 8.46 PeopleBook: Using PeopleSoft Applications

PeopleSoft Enterprise Proposal Management Preface

This preface discusses:

- PeopleSoft products.
- 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.

PeopleSoft Products

This PeopleBook refers to these PeopleSoft products:

- PeopleSoft Enterprise Billing
- PeopleSoft Enterprise Contracts
- PeopleSoft Enterprise General Ledger
- PeopleSoft Enterprise Inventory
- PeopleSoft Enterprise Payables
- PeopleSoft Enterprise Program Management
- PeopleSoft Enterprise Project Costing
- PeopleSoft Enterprise Proposal Management
- PeopleSoft Enterprise Purchasing
- PeopleSoft Enterprise Receivables
- PeopleSoft Enterprise Time and Labor

Application Fundamentals

The *PeopleSoft Enterprise Proposal Management 8.9 PeopleBook* provides you with implementation and processing information for your 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 Enterprise Applications Fundamentals 8.9 PeopleBook*
- *PeopleSoft Global Options and Reports PeopleBook*
- *PeopleSoft Working with Customers and Orders PeopleBook*
- *PeopleSoft Supply Chain Management Integration PeopleBook*

Pages With Deferred Processing

Most pages in 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 that 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

PeopleSoft Application Designer, "Guidelines for Designing Pages"

Common Elements Used in This PeopleBook

Account	ChartField that identifies the nature of a transaction for corporate accounts. This is a delivered PeopleSoft ChartField, specific use of which is typically defined by your organization during implementation of General Ledger.
Activity	The unit of work in Project Costing that provides a further breakdown of projects, usually into specific tasks. Resources are assigned directly to activities within a project, rather than being assigned directly to projects.
Analysis Type	A three-character, user-definable identifier that enables you to label the different types of costs in Project Costing. For example, you might want to track budgeted costs (BUD), committed costs (COM), and actual costs (ACT).
Currency	Code that identifies the type of currency for an amount, such as USD (United States Dollar) or EUR (Euro).
Department	ChartField that indicates who is responsible for or affected by the transaction.
Effective Date	Date on which a table row becomes effective; the date that an action begins. For example, if you want to close out a ledger on June 30th, the effective date for the ledger closing would be July 1st. This date also determines when you can view and change the information. Pages and batch processes that use the information use the current row.
EIP (enterprise integration point)	An EIP is an instance of enterprise integration between your PeopleSoft application and an external system or application: a seamless connection between the two products to accomplish a specific business purpose. EIPs represent the formal methods that third-party applications use to exchange data elements.

Operating Unit ChartField that is used to identify a location, such as a distribution warehouse or sales center.

Process Monitor 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.

See *PeopleSoft Process Scheduler,* "Understanding PeopleSoft Process Scheduler."

Product ChartField that captures additional information useful for profitability and cash flow analysis by product sold or manufactured.

Program ChartField that identifies groups of related activities, cost centers, revenue centers, responsibility centers, and programs. Tracks revenue and expenditures for programs.

Project The highest level of hierarchical organization within Project Costing. Project Costing provides the structure to which activities and resources are added.

Proposal projects obtain their numbering from Project Costing. This ensures continuity with the numbering process when the proposal project becomes a real project. The numbering process occurs when you run the generate process, request pre-award spending, or create the project team.

Contract A contract is a legal agreement between two or more parties. This is the highest level entity within the Contracts module. Proposal numbering is obtained from Contracts and a proposal becomes a contract after you run the generate process.

Proposal A comprehensive estimate provided to a prospect or customer that contains projects, activities, resources, labor, assets, materials, and other projections. The proposal also includes a time frame for the proposed work. A proposal can contain multiple versions for modeling different scenarios prior to finalizing and running the generate process. You can run the generate process only once on the current version of a proposal.

Proposal ID A unique number that is assigned by Contracts to track the proposal throughout the proposal development and Contract Generation process. This ID is derived from the Contracts auto numbering process and remains the same after the Contract Generation process so that the proposal and the contract contain the same ID.

Report ID The report identifier.

Resource Transaction Displays an individual cost or bill row within Project Costing. It is through resource transactions that individual costs and types of costs are tracked. Each resource transaction contains a cost, bill, and quantity, and other identifiers of the cost that may have been entered.

Resource transactions are created when you receive information from other systems, run allocations with project resources as the target, or perform internal transactions such as billing, project closure, or adjustments.

Resource Type The Resource Transaction field in Project Costing that identifies the resource associated with a given cost. Resource types may be general or specific depending on your needs; they are used in conjunction with resource categories, resource subcategories, and resource groups.

Run

This button takes you to the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.

See *PeopleSoft Process Scheduler,* "Understanding PeopleSoft Process Scheduler."

Run Control ID

Code that identifies the run parameters for a report or process.

SetID

Code that represents a set of control table information or tablesets. A tableset is a group of tables (records) necessary to define your company's structure and processing options.

Status

In Proposal Management, status is also used to indicate the state of the proposal. The statuses used in Proposal Management include: *Draft, Ready, Denied, Committed,* and *Canceled.*

Version

To track different scenarios, PeopleSoft supports multiple versions of proposals. Note that users can select only one version (the current version) for sale. The other versions would, however, still be visible.

Basic information, such as the proposal description, start and end dates, customer information, and contacts, remain the same for each version. To create a different version of a proposal, users enter resource details for the projects and activities that they want to associate with the proposal.

CHAPTER 1

Getting Started With PeopleSoft Enterprise Proposal Management

This chapter provides an overview of Proposal Management and discusses:

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

Proposal Management Overview

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

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

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

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

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

The proposal that is accepted by the customer serves as a basis for generating the contract. You can convert all the cost, revenue, billing terms, resource asset, material or other cost rates and resource, asset, material, or other bill rates, into a contract that can be used to bill the customer and recognize revenue. This capability eliminates redundant data entry, increases accuracy, and reduces bill discrepancies.

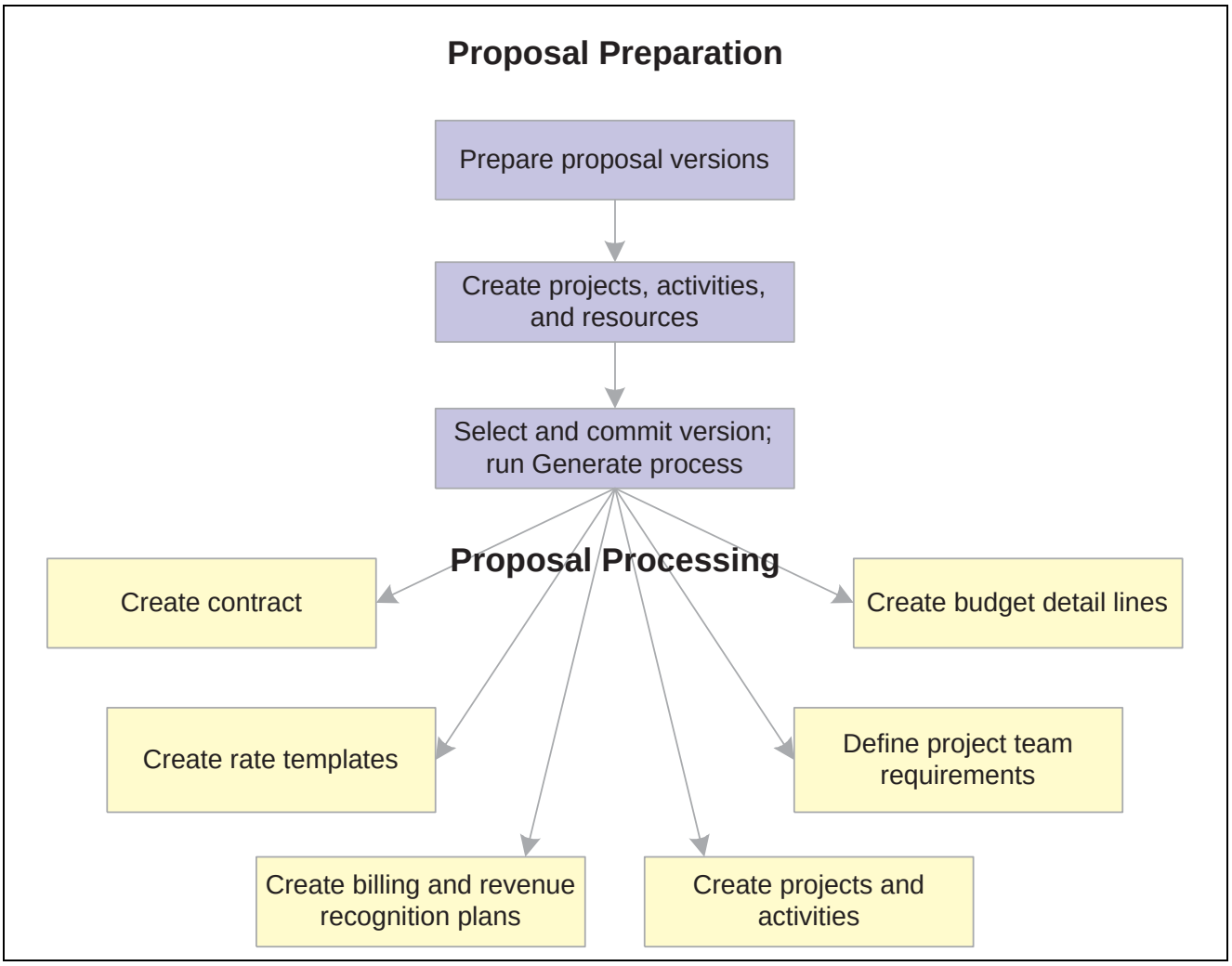
Just as the proposal terms and conditions form the basis of the contract, project plans that are associated with the proposal are used to generate projects. This eliminates the need to recreate critical project information, such as the project activities, timelines, resource requirements, and project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

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

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

Life Cycle of a Proposal

This diagram shows a high-level view of proposal preparation and processing:



Proposal life cycle

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

If you want to begin defining resource requirements for a project before those requirements are approved to incur costs against the project, you can optionally create a project resource team by selecting the Create Resources Team check box on the Maintain Version Estimate Detail page. This creates a project in a Pending processing status in Project Costing. The Create Resources Team process only reserves the labor resource. In Proposal Management, you can jump to the project from the project ID link on the Resource Estimate page and the Maintain Version Estimate Detail page or the Resource Team link on the Maintain Version Estimate Detail page. In Program Management, you can reserve, but not assign, resources to a pending project. The reservations appear on the resource's schedule in Resource Management.

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

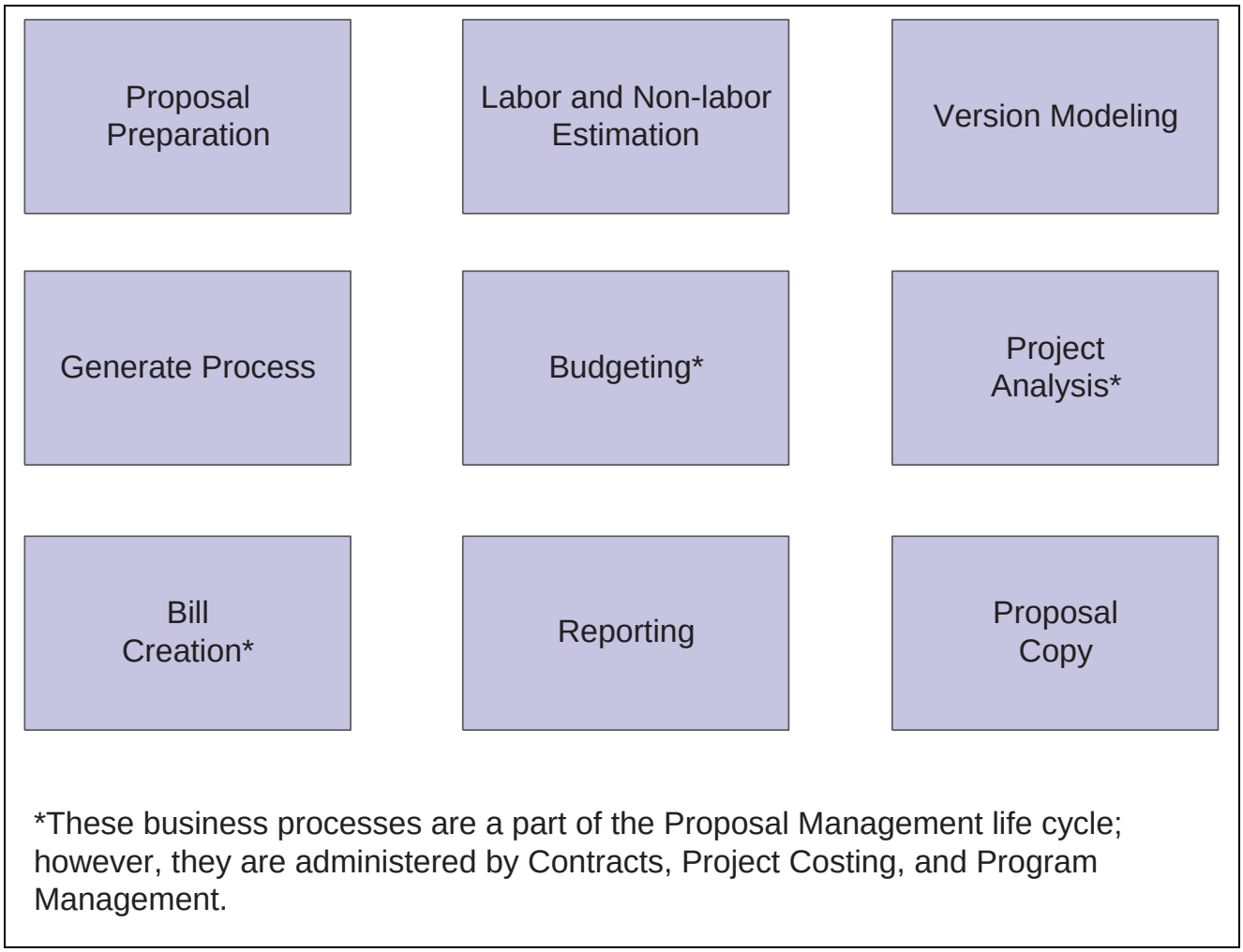
If you want to start incurring costs against a proposal before it is approved, you can optionally run the Pre-Spending process. This process creates projects and activities in Project Costing without creating a contract. The difference between creating projects using the Pre-Spending process and creating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

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

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

Proposal Management Business Processes

This graphic lists the Proposal Management business processes:

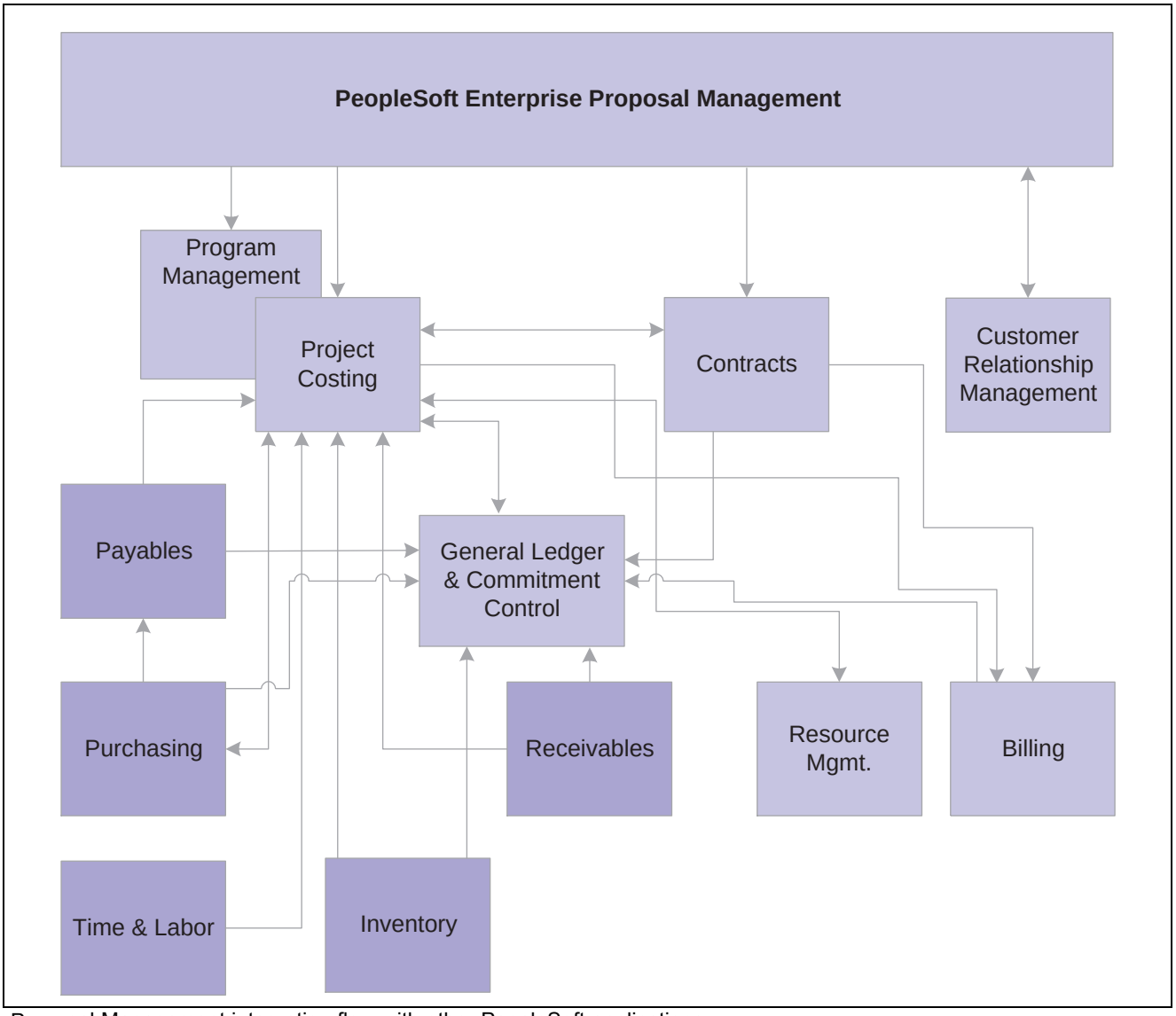


Proposal Management Business Processes

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

Proposal Management Integrations

Proposal Management integrates with the following PeopleSoft applications:



Proposal Management integration flow with other PeopleSoft applications

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

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

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

1. Project Costing
2. Program Management
3. Contracts
4. 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 *PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook*, "Defining and Using ChartFields," Adding Account Values.
Alternate Account (ALTACCT)	ALTACCT_CF	See *PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook*, "Using Alternate Account".
Bank Branch Information (BANK_BRANCHPNL)	TR_BANK_BRANCH_CI	See *PeopleSoft Enterprise Banks Setup and Processing 8.9 PeopleBook*, "Setting Up Banks".
Budget Reference (BUDREF_PNL)	BUDGET_REF	See *PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook*, "Defining and Using ChartFields," Adding Budget Reference Values.
Chartfield 1 (CHARTFIELD1)	CHARTFIELD1	See *PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook*, "Defining and Using ChartFields," Adding Values for Expansion ChartFields 1, 2, and 3.
Chartfield 2 (CHARTFIELD2)	CHARTFIELD2	See *PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook*, "Defining and Using ChartFields," Adding Values for Expansion ChartFields 1, 2, and 3.

Component	Component Interface	Reference
Chartfield 3 (CHARTFIELD3)	CHARTFIELD3	See *PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook*, "Defining and Using ChartFields," Adding Values for Expansion ChartFields 1, 2, and 3.
Class Field (CLASS_PNL)	CLASS_CF	See *PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook*, "Defining and Using ChartFields," Adding Class Field Values.
Contact Info (CONTACT_INFO)	CONTACT	See *PeopleSoft Enterprise Order to Cash Common Information 8.9 PeopleBook*, "Maintaining Contacts," Setting Up Contacts.
Customer Group Table (CUST_ GROUP_TBL)	CUSTOMER_GROUP	See *PeopleSoft Enterprise Order to Cash Common Information 8.9 PeopleBook*, "Maintaining Additional Customer Information," Establishing Customer Group Tables.
Department (DEPARTMENT)	DEPT_CF	See *PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook*, "Defining and Using ChartFields," Adding Department Values.
Fund Code (FUND_DEFINITION)	FUND_CF	See *PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook*, "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 *PeopleSoft Enterprise Order to Cash Common Information 8.9 PeopleBook*, "Maintaining General Customer Information," Adding General Customer Information.
InterUnit Pair Maintenance (IU_INTER_PR_BASIC)	IU_INTER_PR_BASIC	See *PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook*, "Using Interunit and Intraunit Accounting and ChartField Inheritance," Interunit Pairs.
InterUnit Template (IU_INTER_ TMPLT)	IU_INTER_TMPLT	See *PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook*, "Using Interunit and Intraunit Accounting and ChartField Inheritance," Defining Interunit Templates.

Component	Component Interface	Reference
IntraUnit Template (IU_INTRA_ TMPLT)	IU_INTRA_TMPLT	See *PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook*, "Using Interunit and Intraunit Accounting and ChartField Inheritance," Defining Interunit Templates.
Ledgers for a Unit (BUSINESS_ UNIT_LED)	EM_BUS_UNIT_LED	See *PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook*, "Setting Up Ledgers," Defining Ledgers for a Business Unit.
Operating Unit (OPERATING_UNIT)	OPER_UNIT_CF	See *PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook*, "Defining and Using ChartFields," Adding Operating Unit Values.
Product (PRODUCT)	PRODUCT_CF	See *PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook*, "Defining and Using ChartFields," Adding Product Values.
Program Code (PROGRAM_ DEFINTION)	PROGRAM_CF	See *PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook*, "Defining and Using ChartFields," Adding Program Code Values.
Project ID (PROJECT)	PROJECT_CF	See *PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook*, "Defining and Using ChartFields," Adding Project Values and Grant Values.
Scenario (BD_SCENARIO)	BUDGET_SCENARIO	See *PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook*, "Defining and Using ChartFields," Adding Scenario Values.
Statistics Code (STATISTICS_TBL)	STATISTICS_CODE	See *PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook*, "Defining and Using ChartFields," Adding Statistics Code Values.
Support Team Members (TEAM_MEMBER_TABLE)	TEAM_MEMBER_TABLE_CI	See *PeopleSoft Enterprise Order to Cash Common Information 8.9 PeopleBook*, "Maintaining Additional Customer Information," Setting Up Customer Support Personnel.
Team Member Personal Data (MEMBER_PERSON1)	MEMBER_PERSON1_CI	See *PeopleSoft Enterprise Order to Cash Common Information 8.9 PeopleBook*, "Maintaining Additional Customer Information," Setting Up Customer Support Personnel.

Component	Component Interface	Reference
Team Member Types (MEMBER_ TYPE_TABLE)	MEMBER_TYPE_TABLE_CI	See *PeopleSoft Enterprise Order to Cash Common Information 8.9 PeopleBook*, "Maintaining Additional Customer Information," Setting Up Customer Support Personnel.
Value Added Tax Code (TAX_CODE_VAT)	TAX_CODE_VAT	See *PeopleSoft Enterprise Global Options and Reports 8.9 PeopleBook*, "Working with 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 *PeopleSoft Enterprise Global Options and Reports 8.9 PeopleBook*, "Working with VAT," Defining VAT Accounts by General Ledger Business Unit (Optional).
Vat Defaults CI Component (VAT_DEF_CI)	VAT_DEF_CI	See *PeopleSoft Enterprise Global Options and Reports 8.9 PeopleBook*, "Working with VAT," Establishing VAT Defaults.
VAT Entity (VAT_ENTITY_ID)	VAT_ENTITY_ID	See *PeopleSoft Enterprise Global Options and Reports 8.9 PeopleBook*, "Working with VAT," Setting Up VAT Entities.
User Preferences (OPR_DEFAULT)	OPR_DEFAULT_FIN	See *PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook*, "Defining User Preferences," Defining Cross-Application User Preferences.

Other Sources of Information

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

See Also

Enterprise PeopleTools 8.46 PeopleBook: PeopleSoft Setup Manager

Enterprise PeopleTools 8.46 PeopleBook: PeopleSoft Component Interfaces

About These PeopleBooks

CHAPTER 2

Navigating in Proposal Management

This chapter discusses how to navigate in Proposal Management.

Navigating in Proposal Management

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 Proposal Management custom navigation center pages, PeopleSoft provides menu navigation, standard navigation pages, and PeopleSoft Navigator.

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

See Also

Enterprise PeopleTools 8.46 PeopleBook: Using PeopleSoft Applications

Pages Used to Navigate in Proposal Management

This table lists the Custom Navigation Center pages that are used to navigate in 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.
My Proposal	Click the My Proposal link on the Proposal Management Center page.	Manage proposals from a personal list.
Proposal Management	Click the Proposal Management link on the Proposal Management Center page.	Create proposals, versions, and budgets. Also inquire on existing proposals.
Resource Estimate	Click the Maintain Version Estimate link on the Proposal Management Center page.	Establish and update version project and activity estimates.
Resource Estimate Detail	Click the Maintain Version Est. Detail link on the Proposal Management Center page.	Establish and update version activity estimate details.

Page Name	Navigation	Usage
Copy Proposal	Click the Copy Proposal link on the Proposal Management Center page.	Copy a new proposal from an existing proposal.
Contracts	Click the Contracts link on the Proposal Management Center page.	Enter and manage contracts, including billing and revenue recognition options.
Projects	Click the Projects link on the Proposal Management Center page.	Capture and account for costs and revenue associated with a project.
Reports	Click the Reports link on the Proposal Management Center page.	View and create reports.
Definitions	Click the Definitions link on the Proposal Management Center page.	Define or maintain Proposal Management business units and activity types.

See Also

PeopleSoft Enterprise Components for Financials, Enterprise Service Automation and Supply Chain Management 8.9 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 8.9 PeopleBook, "Using Navigation Collections"

CHAPTER 3

Defining Your Operational Structure

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

Understanding Installation Options

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

This section discusses:

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

Overall Installation Options

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

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

You can find instructions for defining overall installation options in the *PeopleSoft Enterprise Applications Fundamentals 8.9 PeopleBook*

See Also

PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook, "Setting Installation Options for PeopleSoft Applications," Setting Up Cross-Application Installation Options

Application-Specific Installation Options

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

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

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

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

You can find instructions for setting application-specific installation options in the *PeopleSoft Enterprise Applications Fundamentals 8.9 PeopleBook*

See Also

PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook, "Setting Installation Options for PeopleSoft Applications," Setting Up Application-Specific Installation Options

Project Delete Utility

In 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 Project Costing.

Setting up this page is a requirement in 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 Enterprise Project Costing 8.9 PeopleBook.*

See Also

PeopleSoft Enterprise Project Costing 8.9 PeopleBook, "Setting Up Project Business Units," Defining Parameters for the Delete Utility

Understanding Integration Templates

Proposal Management integrates with Project Costing, Program Management, Contracts, General Ledger, 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 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 Proposal Management are processed through Project Costing, you need to establish this relationship in the system.

Before you can begin to track contracts and the costs that are associated with them, you must define the integration template that the 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. Proposal Management uses the General Ledger business unit that is designated as the Primary Ledger Business Unit on the General Ledger Integration page. Select Setup Financials/Supply Chain, Product Related, Project Costing, Project Options, Integration Templates, General Ledger Integration.

You can find instructions for defining integration templates in the *PeopleSoft Enterprise Project Costing 8.9 PeopleBook.*

See Also

PeopleSoft Enterprise Project Costing 8.9 PeopleBook, "Setting Up Project Costing Control Data," Defining Templates for Integration with Other Applications

Understanding Business Unit Default Setup

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

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

Project Costing Business Units

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

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

See Also

PeopleSoft Enterprise Project Costing 8.9 PeopleBook, "Setting Up Project Business Units"

Chapter 3, "Defining Your Operational Structure," Defining Proposal Management Defaults and Confidence Levels for Business Units, page 17

Contracts Business Units

You must have Contracts in place before you can use Proposal Management. The business unit that you select in Proposal Management when you create a proposal comes from the Contracts Business Unit table. You establish business units that you plan to use in Contracts on both the BU Definition page and the BU Options page. After you set up the Contracts business units in Contracts, use the Contracts BU Setup page in Proposal Management to establish defaults for proposal-level fields and for the Generate process.

See Also

PeopleSoft Enterprise Contracts 8.9 PeopleBook, "Defining Contracts Business Units"

Understanding Products

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

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

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

- Fixed Amount Products.

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

- Rate Based Products.

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

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

Note. For 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 Proposal Management, the product IDs defined on the Proposal Management Contracts BU Setup page are defaults for the activity level. They are required on the BU Setup page, but you may override them at the activity level because contract lines bill at the activity level.

You can find instructions for defining products in the *PeopleSoft Enterprise Contracts 8.9 PeopleBook* and in the *PeopleSoft Working with Customers and Orders 8.9 PeopleBook.*

See Also

PeopleSoft Enterprise Contracts 8.9 PeopleBook, "Setting Up Products"

PeopleSoft Enterprise Order to Cash Common Information 8.9 PeopleBook, "Setting Up Products"

Defining Proposal Management Defaults and Confidence Levels for Business Units

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

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

This section provides an overview of Proposal Management defaults and confidence levels and 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 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 Project Costing and Contracts before you can set up defaults and confidence levels for the business units in Proposal Management.

Understanding Proposal Management Defaults and Confidence Levels

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

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

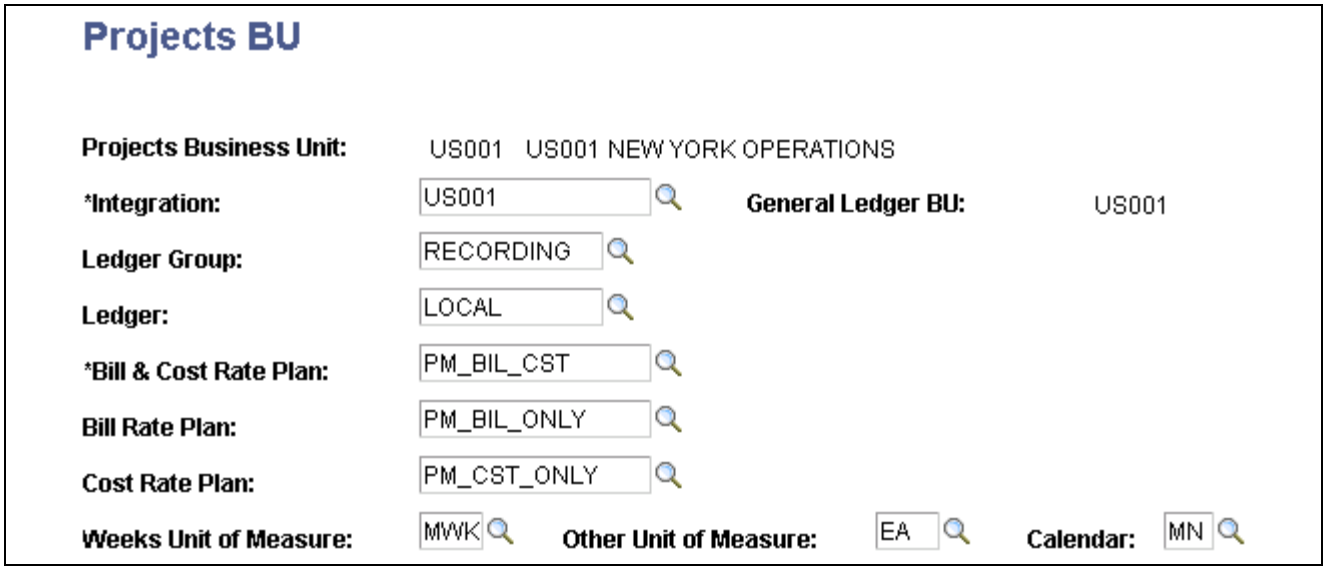
To give users a visual clue about the likelihood that a proposal will be sold, you can set up and maintain confidence levels. You can enter percentages for three confidence levels: high, medium, and low. The system translates the confidence levels into symbols that appear to the right of the Confidence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

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 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 General Ledger system. If you are using Commitment Control, the system displays separate ledger and ledger group fields for expense and revenue transactions.

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

Integration	Select the template that defines the integration between 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 Commitment Control. Select the ledger groups and ledgers that you want the system to default when bringing forward expense and revenue rows that are to be posted to the general ledger.
Bill & Cost Rate Plan	Select a rate plan with billing and costing rate sets. The prompt view for this field displays only active rate plans that contain both billing and costing rate sets.
Bill Rate Plan	Select a rate plan with billing rate sets only. The prompt view for this field displays only active rate plans that contain billing rate sets only.
Cost Rate Plan	Select a rate plan with costing rate sets only. The prompt view for this field displays only active rate plans that contain costing rate sets.
Weeks Unit of Measure	Select *MWK* for the default unit of measure to use when employees select Labor Configuration of *Weeks* on proposals. Proposal Management enables you to set the Labor Configuration by hour, day, or week; however, Project Costing only supports hour or day for unit of measure. You can set up the unit of measure for hour or day on the Project Costing Definition page, but you need to set the unit of measure for week on Proposal Management's Projects BU page.
Other Unit of Measure	Select a unit of measure to default on proposals for non-labor items.
Calendar	This field provides an override value to the default budget calendar that is used by Projects budgets. A budget calendar can be defined for one budget period with a vast time span to cover the start and end date periods for projects.

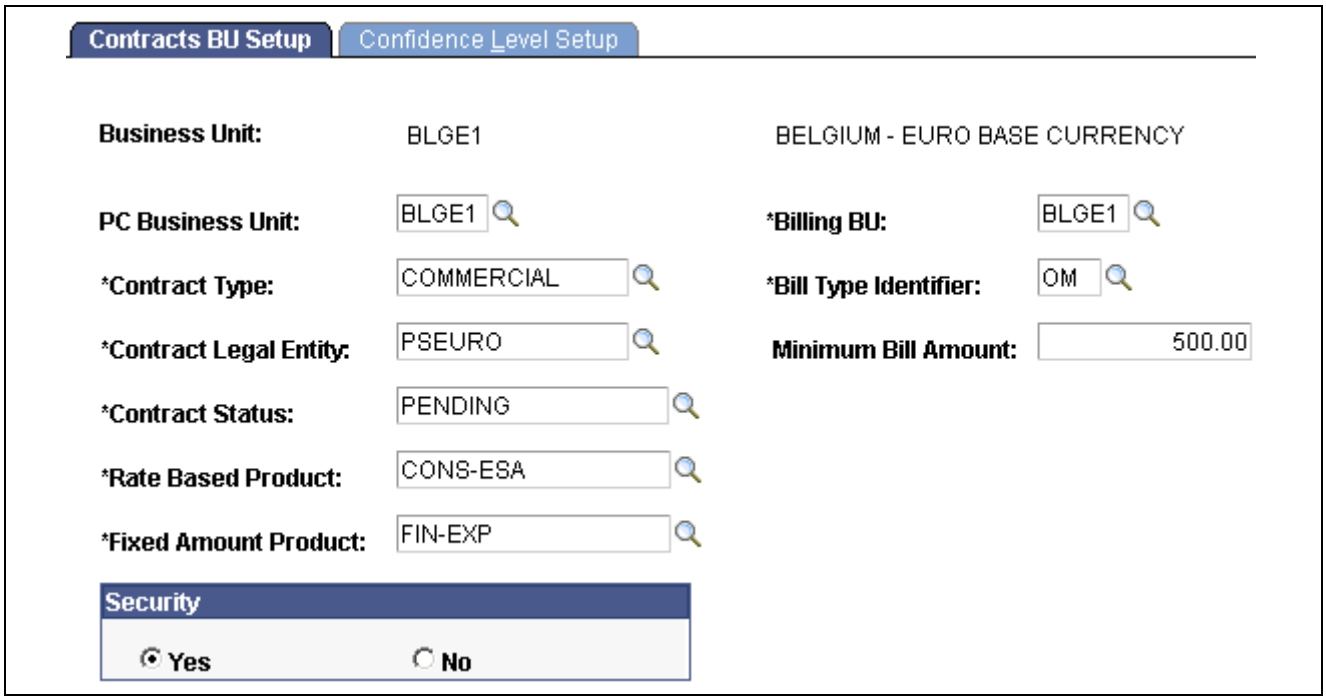
See Also

PeopleSoft Enterprise Project Costing 8.9 PeopleBook, "Setting Up Project Costing Control Data," Defining Templates for Integration with Other Applications

PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook, "Setting Up Ledgers"

Defining Contracts Business Unit Defaults for Proposal Management

Access the Contracts BU Setup page.



Contracts BU Setup page

PC Business Unit (project costing business unit)	Select the Project Costing business unit in which you want to store your projects-related information.
Billing BU (billing business unit)	Select the business unit that you want to use for billing. This field is a default for contracts that are created under this business unit. The values that you can select are limited to those Billing business units that are linked to the same General Ledger business unit as the Contracts business unit.
Contract Type	Select a value to categorize your contracts for reporting purposes.
Bill Type Identifier	Select a bill type. This field is a default for contracts that are created under the business unit. The bill type represents a category of activity that is being billed.
Contract Legal Entity	Select a legal entity from the list of entities that you established on the Define Legal Entity page in Contracts. This is the legal entity in your company that owns or has signed the contract. A legal entity is required for contract activation.
Minimum Bill Amount	Enter an amount to specify the minimum threshold that will produce a bill during contract administration.
Contract Status	Select the status to appear by default when the contract is first established. The system uses this field to control all processing that occurs against a contract.
Rate Based Product	Select the rate-based product that you will use most often on the contract lines. The lookup list for this field displays only product IDs with a price type of *Rate* and a revenue recognition method of *As Incurred.* Products are defined on the Product Definition pages and in Contracts.
Fixed Amount Product	Select the fixed-amount product offering that you will use most often on the contract lines.

The lookup list for this field displays only products with a price type of *Amount* and a revenue recognition method other than *As Incurred.* Products are defined in the Product Definition pages and in 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 Enterprise Contracts 8.9 PeopleBook, "Structuring Contracts," Defining Contract Types

PeopleSoft Enterprise Contracts 8.9 PeopleBook, "Structuring Contracts," Defining Legal Entities

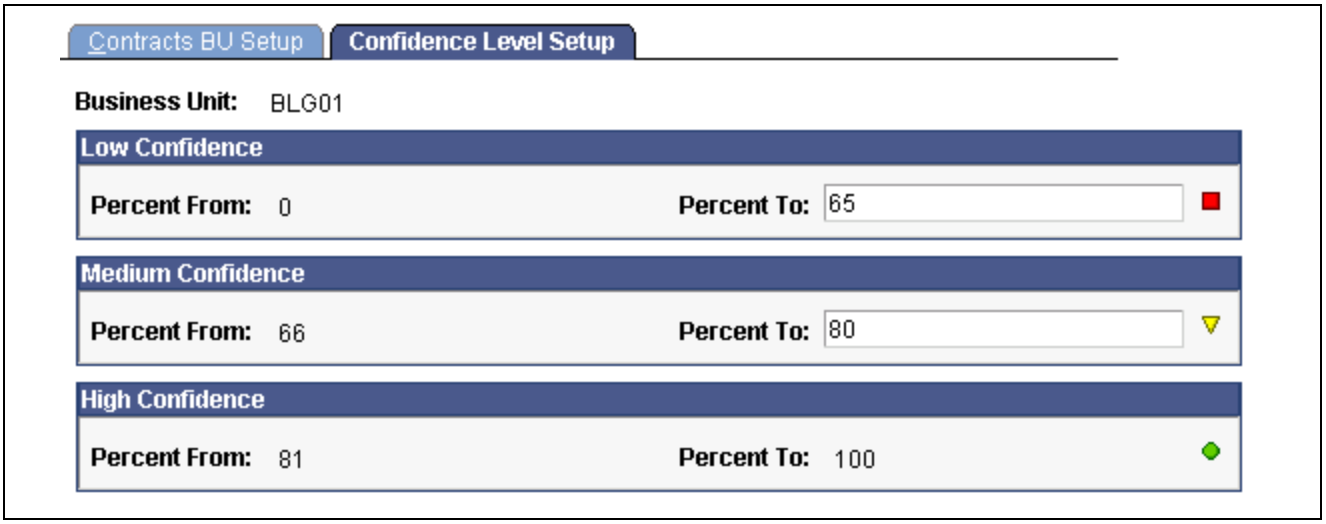
PeopleSoft Enterprise Contracts 8.9 PeopleBook, "Structuring Contracts," Defining Contract Statuses

PeopleSoft Enterprise Contracts 8.9 PeopleBook, "Setting Up Products"

PeopleSoft Enterprise Billing 8.9 PeopleBook, "Establishing PeopleSoft Billing Business Units"

Defining Confidence Levels for Proposal Management

Access the Confidence Level Setup page.



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

Securing Your Proposal Management System

Use the Proposal Management Security (GM_PM_SEC_OPR_GBL) component to define operator security for Proposal Management.

This chapter provides an overview of Proposal Management security.

Understanding Proposal Management Security

This section discusses:

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

Multilevel Security

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.

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 access a proposal if these conditions are met:

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

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

Security by Department and User ID

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

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

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

To set up security by Department ID:

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

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

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

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

   ---

3. Define the 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 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 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

CHAPTER 5

Structuring Proposal Management

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

Understanding Proposal Management Structure

This section discusses:

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

See Also

PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook, "Defining Financials and Supply Chain Management Common Definitions"

Customer Information

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

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

See Also

PeopleSoft Enterprise Order to Cash Common Information 8.9 PeopleBook, "Maintaining General Customer Information"

PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook, "Defining Financials and Supply Chain Management Common Definitions," Defining Additional Common Information

PeopleSoft Enterprise Order to Cash Common Information 8.9 PeopleBook, "Maintaining Additional Customer Information," Using Quick Customer Create

PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook, "Defining Financials and Supply Chain Management Common Definitions," Setting Up Automatic Numbering

Proposal Contacts

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

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

See Also

PeopleSoft Enterprise Order to Cash Common Information 8.9 PeopleBook, "Maintaining Additional Customer Information," Using Quick Customer Create

Project Roles and Rates

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

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

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

See Also

PeopleSoft Enterprise Project Costing 8.9 PeopleBook, "Pricing Project Costs," Pages Used to Define Rate Sets and Plans

PeopleSoft Enterprise Project Costing 8.9 PeopleBook, "Securing Data in Project Costing"

PeopleSoft Enterprise Project Costing 8.9 PeopleBook, "Setting Up Project Costing Control Data"

Proposal Planners

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

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

See Also

PeopleSoft Enterprise Application Fundamentals 8.9 PeopleBook, "Defining Financials and Supply Chain Management Common Definitions," Defining Additional Common Information

Defining Proposal Management Control Data

Use these components to define proposal management control data:

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

This section discusses how to:

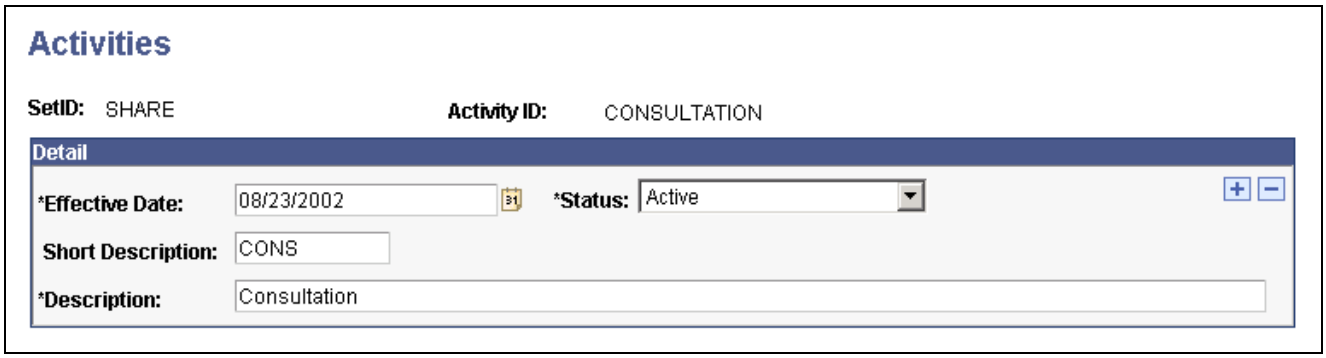
- Create activity ID templates.
- Create budget items.
- Create key words.

Pages Used to Define Proposal Management Control Data

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 Items	PC_BUD_ITEMS	Set Up Financials/Supply Chain, Product Related, Project Costing, General Options, Budget Items	Create budget items. Entering values on this page provides the prompts for the Budget Item field on the Maintain Version Estimate Detail page.
Proposal Key Words	GM_PROP_CTR_KEY	Set Up Financials/Supply Chain, Product Related, Proposal Management, Proposal Key Words	Create key words. Entering values on this page provides the prompts for the Key Word field on the KeyWords page.

Creating Activity ID Templates

Access the Activities page.

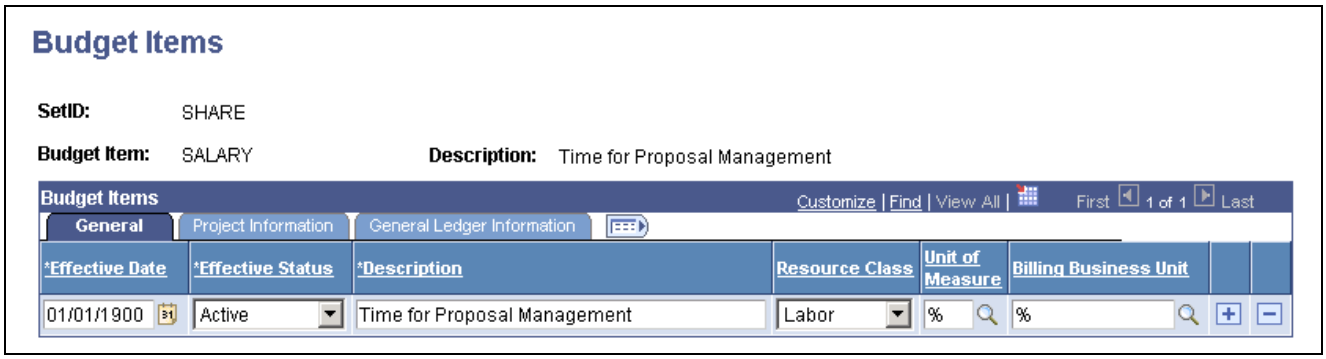


Activities page

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

Creating Budget Items

Access the Budget Items page.



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 in the Budget Item field on the Maintain Version Estimate Detail page in Proposal Management.

Budget Items - General Tab

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

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

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

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

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

Budget Items - Project Information Tab

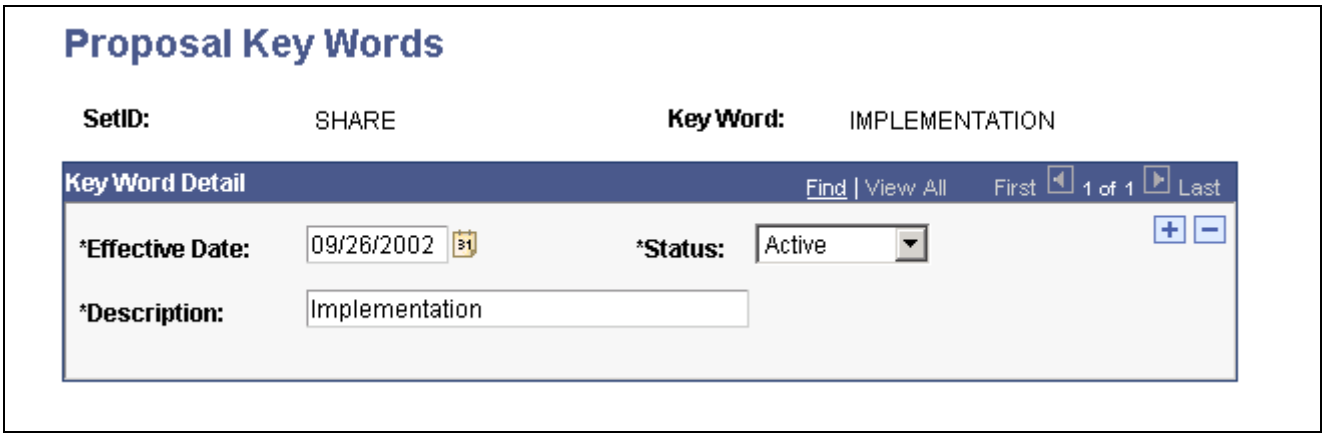
Use the fields in this tab to associate fields in Project Costing with the budget item.

Budget Items - General Ledger Information Tab

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

Creating Key Words

Access the Proposal Key Words page.



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 Proposal Management. To add key words to the system, select an effective date and status, and then enter a description for the key word.

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

CHAPTER 6

Understanding the Proposal Process

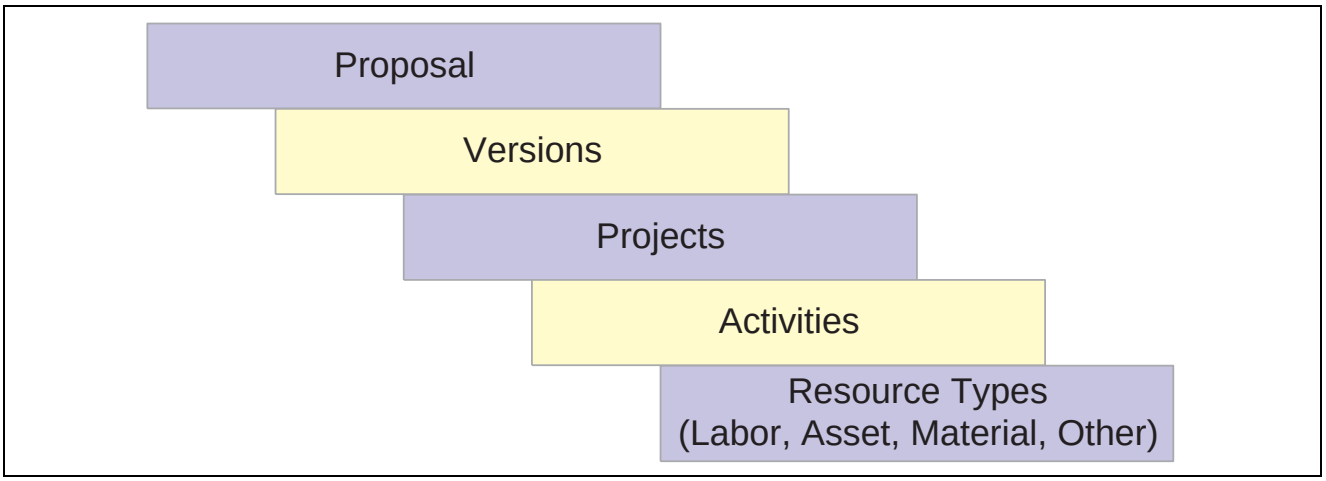
This chapter discusses:

- The proposal preparation process.
- Project teams.
- The Contract Generation process.

Understanding the Proposal Preparation Process

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

This diagram shows the hierarchy of a proposal:



Proposal Hierarchy

Using Proposal Management:

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

To prepare and generate proposal information using Proposal Management:

- Enter general proposal information.

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

- Configure the system to calculate labor.

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

  If you estimate labor by hours, the total will be:

$$Hourly\ Rate\ \times\ Hours$$

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

  If you estimate labor by weeks, the total will be:

$$Hours\ Per\ Week\ \times\ Number\ of\ Weeks\ \times\ Hourly\ Rate$$

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

- Enter security and billing information.

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

- Enter labor estimates.

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

- We combined Time and Expense to Resource in the 8.9 release.

- Add attachments and key words.

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

- Enter adjustments.

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

- Enter new proposal versions.

  After you finish creating an initial proposal and version, you can create different versions of the same proposal by adding a row in the Version group box on the Maintain Proposal page. As you enter new labor and non-labor information, the system calculates the totals for the particular version of the proposal and summarizes the information on the Maintain Proposal page. This feature is useful when you want to compare time and expense estimates for different versions of the same proposal. Only one version, however, can be submitted for the Contract Generation process.

- Generate contracts.

  After the customer accepts a version of the proposal, you can change the status of the proposal to *Committed* and then generate data that 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 Costing uses project teams to identify and manage the resources that are needed to complete an assignment. In Proposal Management, you can initiate the creation of a project resource team for the selected version of a proposal by selecting the Create Resources Team check box on the Maintain Version Estimate Detail page.

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

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

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

See Also

PeopleSoft Enterprise Project Costing 8.9 PeopleBook, "Staffing Project and Activity Teams"

Project Delete Utility

To delete unused project team structures, 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 the prior proposal version. The system initiates the deletion of the project structures (including the project team structures) by calling the Project Delete Utility from the PeopleCode.

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

See Also

PeopleSoft Enterprise Project Costing 8.9 PeopleBook, "Setting Up Project Business Units," Defining Parameters for the Delete Utility

Understanding the Generate Process

This section discusses:

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

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

The Generate Process

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

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

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

Contract General Information

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

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

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

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

See Also

PeopleSoft Enterprise Contracts 8.9 PeopleBook, “Creating Contracts,” Defining General Contract Information

Contract Lines

A contract line corresponds to an individual product or service. The Generate process in 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 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 Enterprise Contracts 8.9 PeopleBook, "Setting Up Products"

PeopleSoft Enterprise Contracts 8.9 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 Contracts drives the creation of bill lines for fixed-price contract lines. For rate-based contract lines, data from both Contracts and Project Costing drives the creation of bill lines. In both cases, Contracts creates the bill lines for the Billing Interface tables (PS_INTFC_BI, PS_INTFC_BI2, PS_INTFC_NOTE, PS_INTFC_BI_AEDS, and PS_INTFC_BI_HDR).

The Generate process in Proposal Management fills in the appropriate fields on the Billing Plan General page in Contracts based on the default values that you set up for the 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 Billing, you must run the Contracts/Billing Interface process (CA_BI_INTFC).

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

See Also

PeopleSoft Enterprise Contracts 8.9 PeopleBook, "Setting Up Billing Plans"

PeopleSoft Enterprise Contracts 8.9 PeopleBook, "Processing Contracts Billing"

PeopleSoft Enterprise Order to Cash Common Information 8.9 PeopleBook, "Setting Up Products," Establishing Product Definitions

Revenue Recognition Plans

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

The Generate process in Proposal Management fills in the appropriate fields on the Rev Rec Plan (revenue recognition plan) page in 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 Contracts drives the creation of accounting entries for fixed-amount contract lines. For rate-based contract lines, data from Contracts and Project Costing drives the creation of accounting entries. In both cases, Contracts creates accounting entries to send to General Ledger and creates the bill lines that the system sends to Billing.

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

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

See Also

PeopleSoft Enterprise Order to Cash Common Information 8.9 PeopleBook, "Setting Up Products," Establishing Product Definitions

PeopleSoft Enterprise Contracts 8.9 PeopleBook, "Setting Up Revenue Plans"

Projects and Activities

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

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

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

See Also

PeopleSoft Enterprise Project Costing 8.9 PeopleBook, "Creating and Maintaining Projects"

PeopleSoft Enterprise Project Costing 8.9 PeopleBook, "Creating and Maintaining Activities"

Rate Sets

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

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

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

See Also

PeopleSoft Enterprise Contracts 8.9 PeopleBook, "Working with Project Costing," Understanding the Relationship Between Contracts and Project Costing

PeopleSoft Enterprise Project Costing 8.9 PeopleBook, "Pricing Project Costs," Pages Used to Define Rate Sets and Plans

PeopleSoft Enterprise Project Costing 8.9 PeopleBook, "Pricing Project Costs"

PeopleSoft Enterprise Project Costing 8.9 PeopleBook, "Integrating with Contracts and Billing"

Budget Generation

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

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

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

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

See Also

PeopleSoft Enterprise Project Costing 8.9 PeopleBook, "Budgeting Project Costs and Revenue"

CHAPTER 7

Preparing, Generating, and Viewing Proposal Information

This chapter discusses how to:

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

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 Management Center, Proposal Management, Maintain Proposal • Proposal Management, Proposal and Version, Maintain Proposal	Enter general proposal information.

Entering Proposal Information

Access the Maintain Proposal page.

Maintain Proposal

Proposal: CON000000000025 ***Status:** 01 - Draft

***Description:** Implementation services quote **Confidence Pct:** 90 ***Currency:** USD

***Customer:** Alliance Group ***Start Date:** 03/01/2005 ***End Date:** 02/28/2006

Proposal Contact: Angelini,Gina **Proposal Due:** 02/15/2005

Proposal Planner: Miller,William

Generate Status: Not Generated Add to My Proposals Pre-Spending Generate Process Monitor

Comments

Version Customize | Find | First 1-3 of 3 Last

Overall Summary | Labor Summary | Non-labor Summary

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

Go To: Labor Configuration Set Up Options

Maintain Proposal page

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

Proposal

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

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

Status

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

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

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

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

Confidence Pct (confidence percentage)

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

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

Indicates a low confidence level.

Indicates a medium confidence level.

Indicates a high confidence level.

Currency

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

Customer

Select the customer for whom you are creating the proposal.

Start Date and **End Date**

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

Proposal Contact

Select the person who is the contact for the proposal.

Proposal Due

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

Proposal Planner

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

Generate Status

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

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

  If you initiated the Pre-Spending process when the proposal was in the *Draft* or *Ready* status, you can add new projects and activities. You cannot delete existing projects and activities, although you can add or delete detail lines. You cannot select a different version of the proposal from the one that you selected for the Pre-Spending process, as the system has already created the projects and activities in 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 Project Costing and Contracts. The proposal must contain one or more projects before you can generate a contract, and the proposal must be in *Committed* status.

Add to My Proposals

Click to add the proposal to the My Proposal page.

See Chapter 7, "Preparing, Generating, and Viewing Proposal Information," Using the My Proposals Page, page 58.

Pre-Spending

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

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

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

Generate

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

Comments

Type

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

Description

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

Version: Overall Summary Tab

Version

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

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

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

Cost Amount, Bill Amount, and **Proposed Amount**

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

Labor Adjustment Percent

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

Nonlabor Adjustment Percent

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

Labor Margin Percent

Displays as a percentage the difference between the proposed amount and the cost amount for labor:

$$(Proposed\ Amount - Cost\ Amount) \div Proposed\ Amount$$

Nonlabor Margin Percent

Displays as a percentage the difference between the proposed amount and the cost amount for non-labor expenses:

$$(Proposed\ Amount - Cost\ Amount) \div Proposed\ Amount$$

Version: Labor Summary Tab

Adjustment Percent

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

Margin Percent

Displays as a percentage the difference between the proposed amount and the cost amount for labor:

$$(Proposed\ Amount - Cost\ Amount) \div Proposed\ Amount$$

Version: Non-labor Summary Tab

Adjustment Percent

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

Margin Percent

Displays as a percentage the difference between the proposed amount and the cost amount for non-labor expenses:

$$(Proposed\ Amount - Cost\ Amount) \div Proposed\ Amount$$

Configuring Labor Defaults, Bill Options, and Security

This section discusses how to:

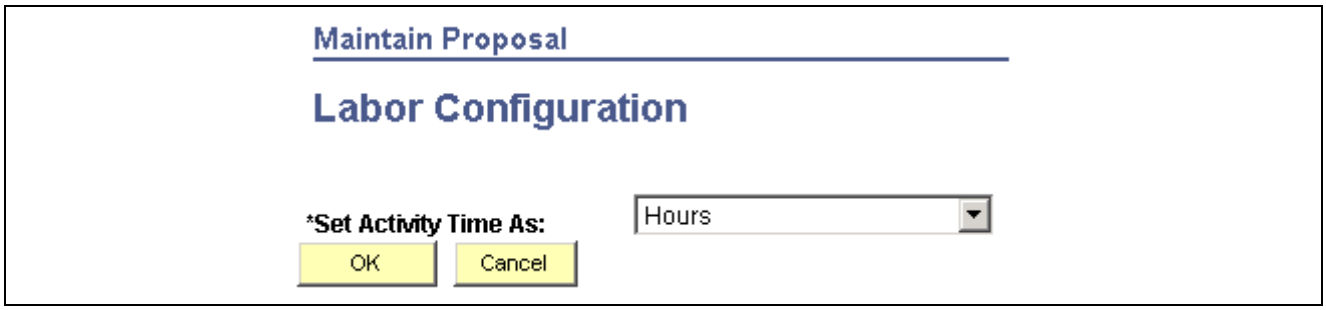
- Configure proposal labor defaults.
- Set up proposal bill options and security.

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

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

Configuring Proposal Labor Defaults

Access the Labor Configuration page.



Labor Configuration page

Set Activity Time As

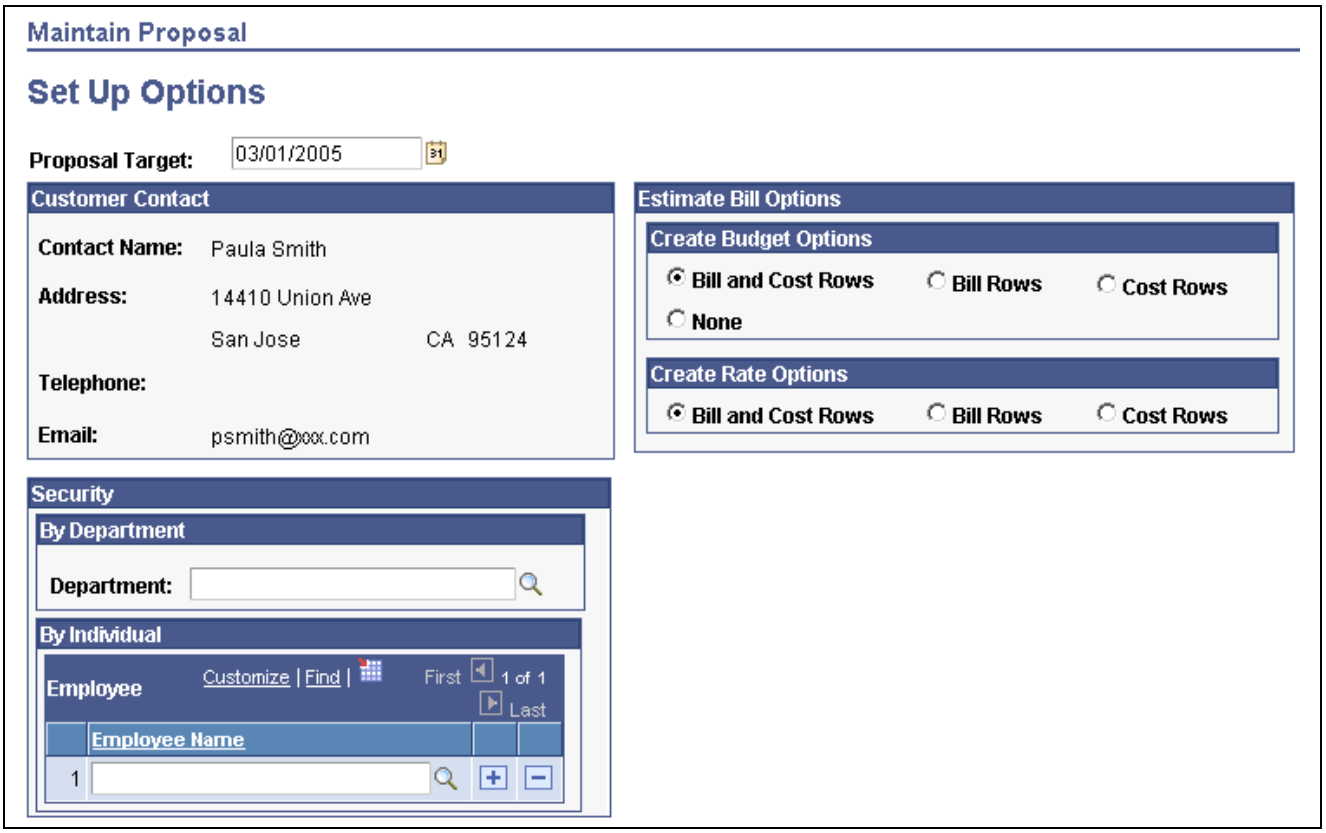
Select a value to specify how to calculate time on the proposal. The value that you select here appears as the column heading on the Units tab on the Maintain Version Estimate Detail page.

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

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

Setting Up Proposal Billing Options and Security

Access the Set Up Options page.



Set Up Options page

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

Customer Contact

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

Estimate Bill Options

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

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

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

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

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

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

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

Security

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

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

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

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

Entering Resource Estimates

This section discusses how to:

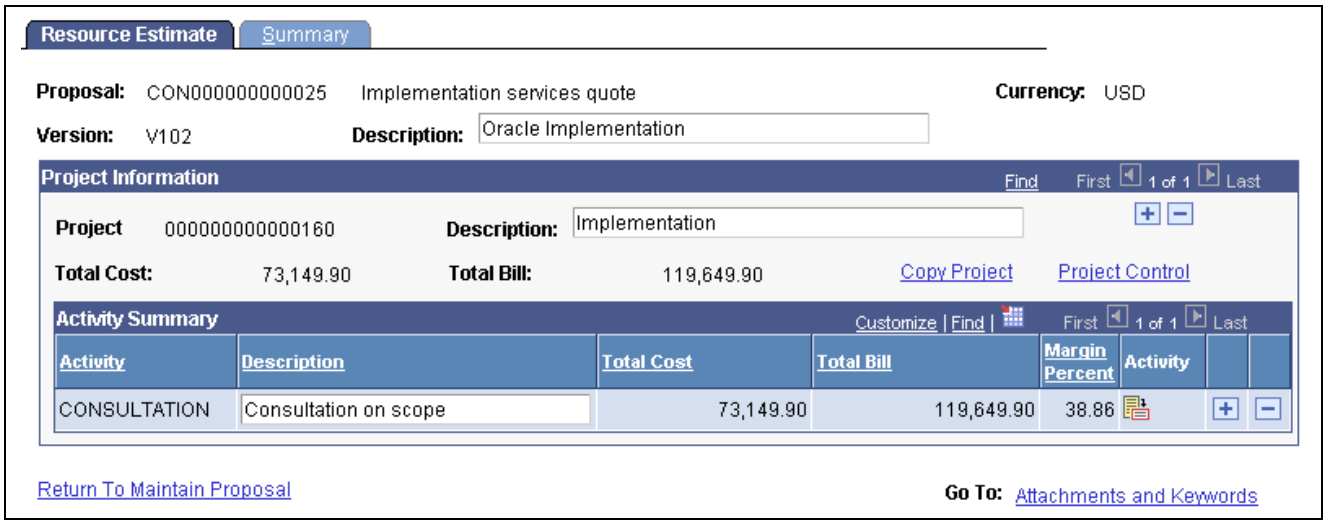
- Create labor and resource estimates.
- Make adjustments to the bill rate.
- Create expense estimates.
- Enter project control details.
- Add attachments.
- Add key words.
- View time and expense summary information.

Pages Used to Enter Labor and Non-Labor Estimates

Page Name	Object Name	Navigation	Usage
Maintain Proposal	GM_OPPTY_HDR	• Proposal Management, Proposal Management Center, Proposal Management, Maintain Proposal • Proposal Management, Proposal and Version, Maintain Proposal	Enter general proposal information.
Resource Estimate	GM_PM_RSRC_EST	Click the Version link on the Maintain Proposal page.	Create or modify project and activity information. You can also view the total bill and cost amounts by activity.
Maintain Version Estimate Detail	GM_OPPTY_DTL	Click the To Activity button in the Activity Summary grid on the Resource Estimate page.	Enter resource information.
Bill Estimate - Resource Note	GM_SCEN_LINE_NOTE	Click the Notes button in the Resources grid on the Maintain Version Estimate Detail page.	View or modify information about the resource line.
Current Bill Rate	GM_ADJUSTB_SECPNL	Click the Adjust Current Limit Bill Rate button in the Resources grid on the Maintain Version Estimate Detail page.	Make adjustments to the billing rate.
Project Control	GM_OPPTY_PRJCT_CTL	Proposal Management, Proposal and Version, Maintain Proposal, Version. Click the Project Control link on either the Time Estimate page or the Expense Estimate page.	Displays high-level project information. You can change the PeopleSoft Project Costing business unit, type, and manager.
Attachments	GM_OPPTY_DOC1	Click the Attachments and Keywords link on the Resource Estimate page.	Add documents to the proposal.
Keywords	GM_OPPTY_KEYWORD	Click the Attachments and Keywords link on the Resource Estimate page; then click the Keywords tab.	Add keywords to the proposal.
Summary	GM_OPPTY_SUMMARY	Proposal Management, Proposal and Version, Maintain Proposal, Version, Summary	View time and expense information at the project, activity, and overall time and expense levels.

Entering Resource Estimates

Access the Resource Estimate page.



Resource Estimate page

Project Information

Project

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

After you run the Contract Generation or the Pre-Spending process, the system turns this field into a link that you can click to access the Project General page in 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 8, "Copying Proposals, Versions, and Projects," page 63.

Project Control

Click to access the Project Control page, which contains Project Costing related fields that the system uses in the project creation process.

See Chapter 7, "Preparing, Generating, and Viewing Proposal Information," Entering Project Control Details, page 55.

Activity Summary

Activity

Select an activity type to add to the project that you are creating. You can select an activity type from the list or enter a new one (which does not appear in the prompt list). Activity cannot be *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 Project Costing.

Description Enter text to describe the activity that you are adding to the project.

Total Cost Displays the total cost contained in the project across all activities.

Total Bill Displays the total bill amount contained in the project across all activities.

Margin Percent Displays as a percentage the difference between the total bill and the total cost for activities:

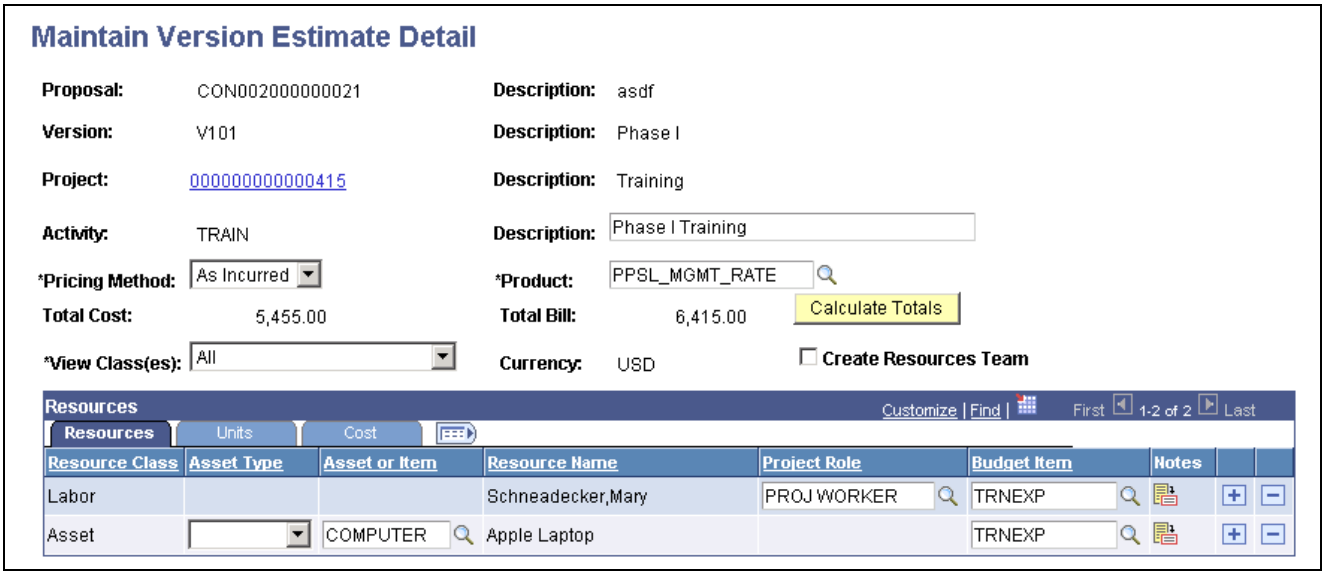
$$(Total\ Bill - Total\ Cost) \div Total\ Cost$$

Click the Activity button to access the Maintain Version Estimate Detail page.

Attachments and Keywords Click to access the Attachments and Keywords pages.

Entering Resource Estimate Details

Access the Maintain Version Estimate Detail page.



Maintain Version Estimate Detail page

Project Click to access the General Information page.

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

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

recognition method of *Apportionment, Milestone,* or *Percent Complete.* Fixed applies to the contract line and to both revenue recognition and billing.

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

Product

The entry in this field appears by default from the Contracts BU Setup page and is based on the value you select for the Pricing Method field. If you select a new value in the Pricing Method field, the entry in this field changes accordingly. You define products on the Product Definition pages and in Contracts. The product you select here is used for billing purposes in Contracts after your run the Contract Generation process.

See Chapter 3, "Defining Your Operational Structure," Understanding Products, page 16.

Total Cost

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

Total Bill

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

Calculate Totals

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

View Class(es)

Select to view specific Resource Classes on the Resources tab.

Create Resources Team

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

Resources - Resources Tab

Resource Class

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

Asset or Item

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

Resource Name

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

Project Role

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

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

Budget Item

Select to identify a budget item with the resource class.

Click the Notes button to access the Resource Note page.

Resources - Units Tab

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

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

Unit of Measure Select a unit of measure.

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

Resources - Cost Tab

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

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

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

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

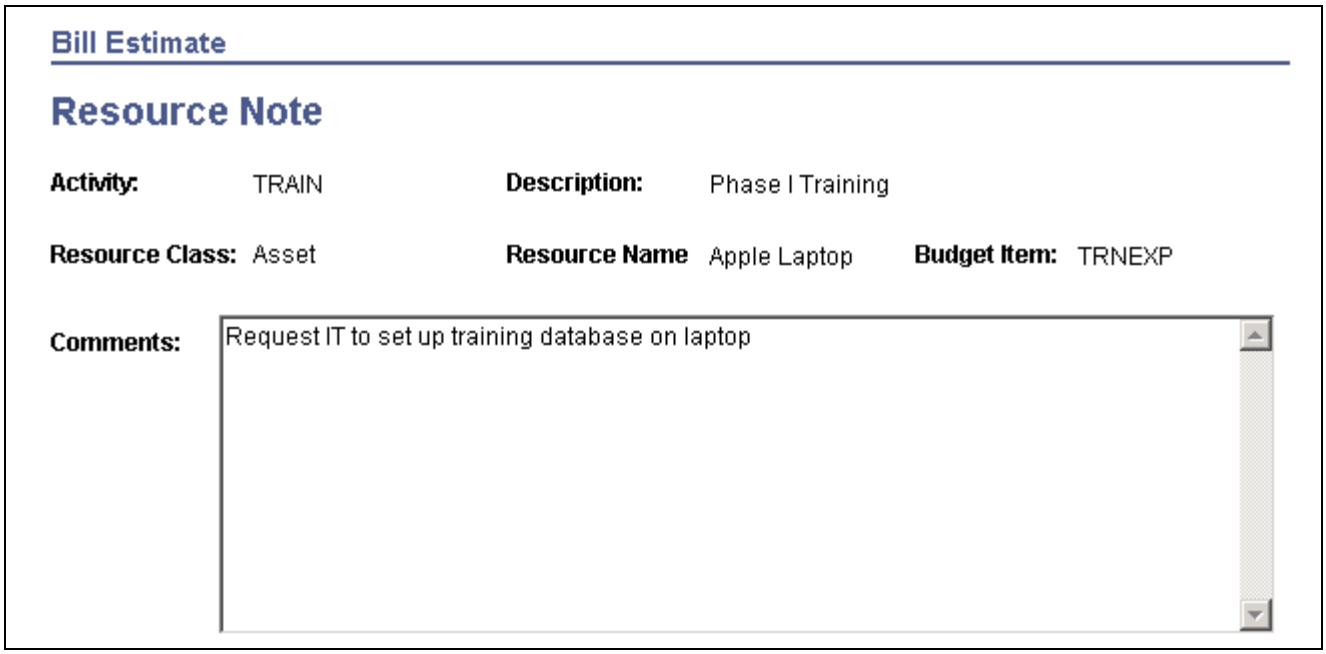
Adjust Click to access the Bill Estimate - Current Bill Rate page. You can use this page to make adjustments to the bill rate as a flat amount, as a percentage, or as a new rate.

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

See Chapter 7, "Preparing, Generating, and Viewing Proposal Information," Adjusting the Bill Rate, page 54.

Entering Resource Notes

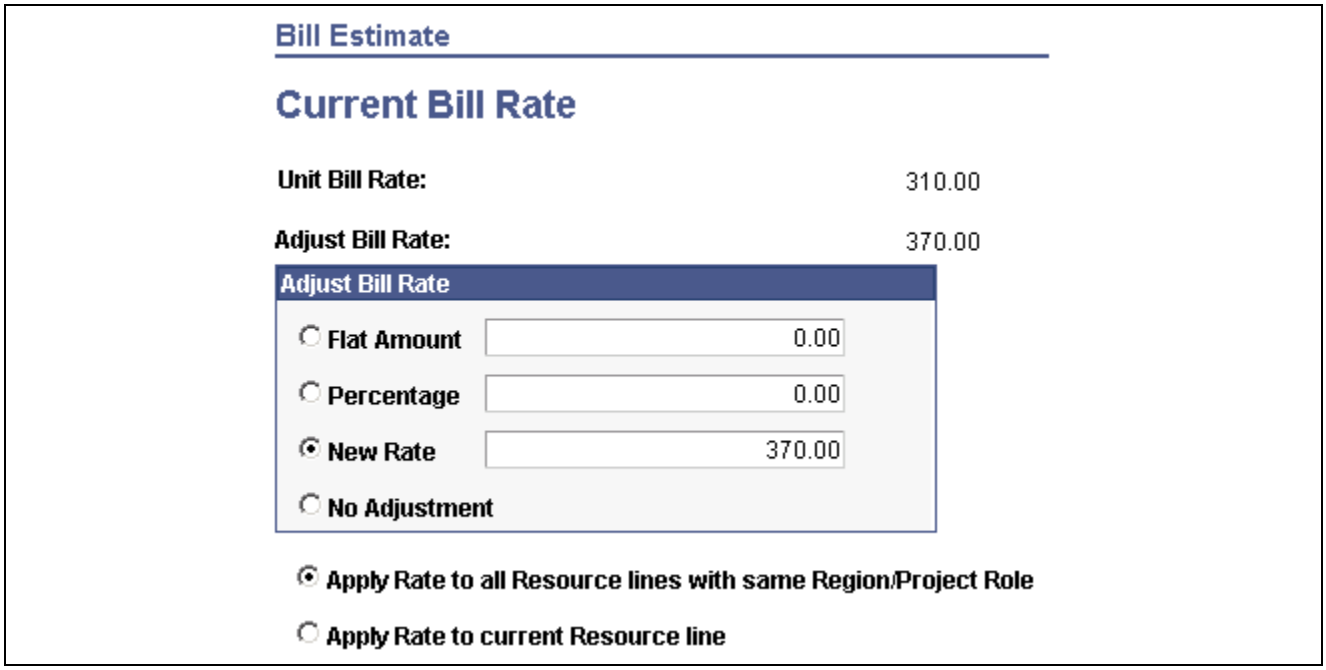
Access the Bill Estimate - Resource Note page.



Bill Estimate - Resource Note page

Adjusting the Bill Rate

Access the Bill Estimate - Current Bill Rate page.



Bill Estimate - Current Bill Rate

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

Adjust Bill Rate Displays the new rate based on the adjustments you made.

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

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

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

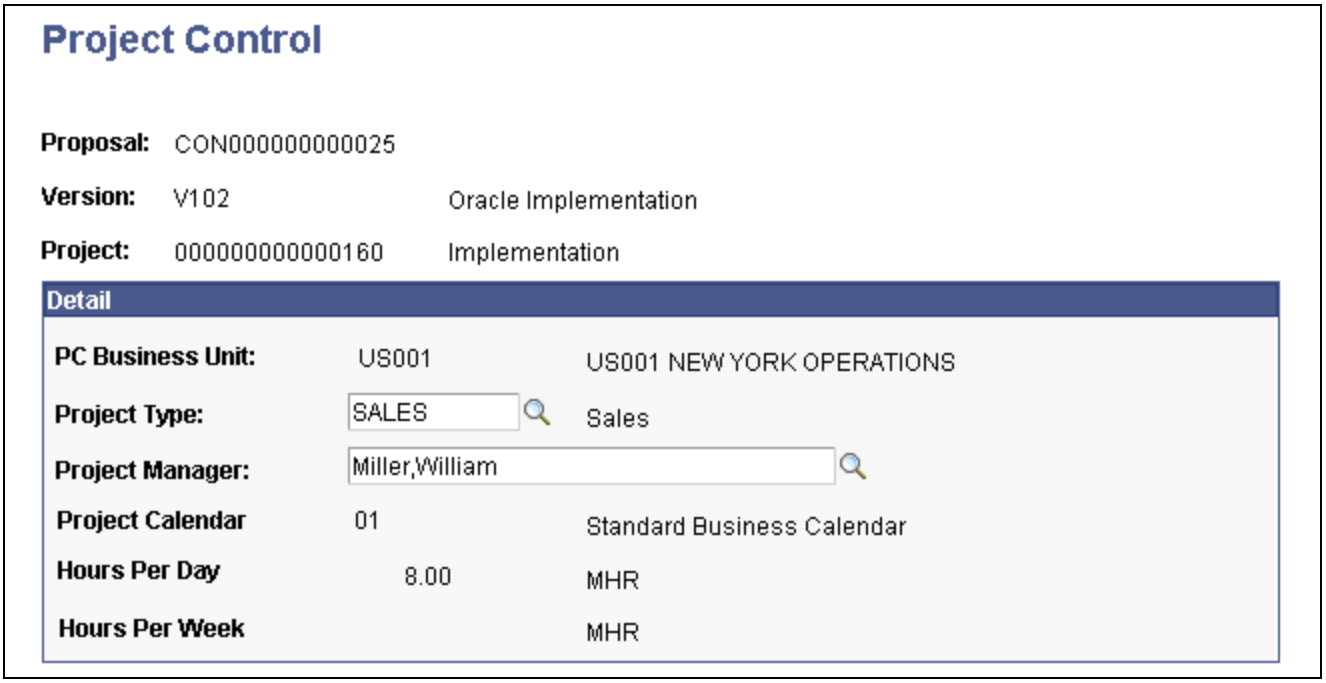
No Adjustment Select this option if you want the system to use the original rate when it calculates the proposed bill amount for the project role.

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

Apply Rate to current Resource line Select this option if you want to apply the rate only to the current resource row.

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

PC Business Unit (project costing business unit)

Displays the Project Costing business unit that you selected when you set up the PC business unit. To control the project using another Project Costing business unit, select a new one. The value in the PC Business Unit field cannot be changed if you have created detail lines for Time or Expense, or when the project team has been created.

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

Project Type

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

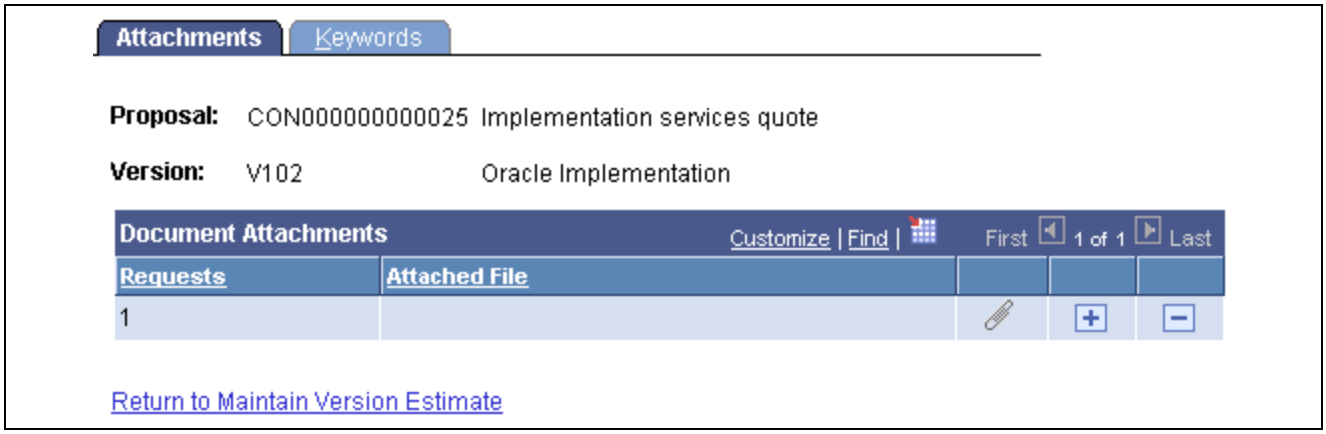
See *PeopleSoft Enterprise Project Costing 8.9 PeopleBook*, "Setting Up Project Costing Control Data".

Project Manager

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

Adding Attachments

Access the Attachments page.



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.

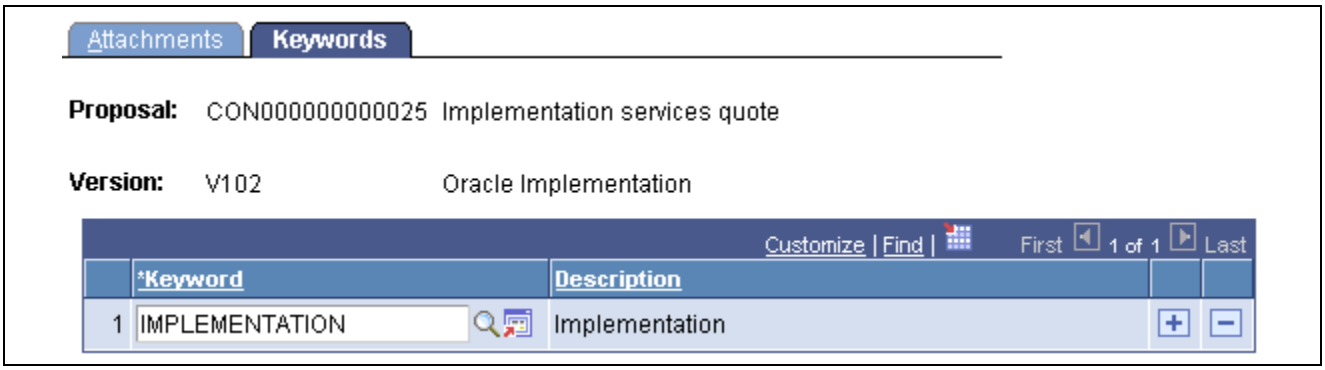
Click the View Attachment button to display the contents of the attached document.

Return to Maintain Version Estimate

Click to return to the Resource Estimate page.

Adding Keywords

Access the Keywords page



Keywords page

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

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

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

Viewing Resource Summary Information

Access the Summary page.

Resource Estimate | Summary

Proposal: CON002000000021 Software Implementation **Currency:** USD

Version: V101 Phase I **Start Date:** 11/16/2004 **End Date:** 11/30/2004

***Summary By:** Proposal

Total Cost Amount: 6,415.00

Total Bill Amount: 7,695.00

Total Adjustment Amount: 0.00 **Labor Overall Margin:** 16.67 %

Total Proposed Amount: 7,695.00 **Nonlabor Overall Margin:** 0.00 %

Detail Customize | Find | First 1-3 of 3 Last

	Project ID	Activity ID	Resource Class	Resource Name	Project Role	Budget Item	Qty	Hours	Cost Rate	Cost Amount	Bill Rate	Bill Amount	Margin Percent
1	000000000000190	IMPLEMENTATION	Labor	Mise,Barbara	PROJ CLERK	CONSLT	1	32	30.00	960.00	40.00	1,280.00	25.00
2	000000000000415	TRAIN	Labor	Schneadecker,Mary	PROJ WORKER	TRNEXP	1	32	170.00	5,440.00	200.00	6,400.00	15.00
3	000000000000415	TRAIN	Asset	Apple Laptop		TRNEXP	1		15.00	15.00	15.00	15.00	0.00

Labor Cost Amount: 6,400.00

Labor Bill Amount: 7,680.00

Labor Adjustment Amount: 0.00 **Labor Adjustment Percent:** 0.00%

Labor Proposed Amount: 7,680.00 **Labor Overall Margin:** 16.67%

Nonlabor Cost Amount: 15.00

Nonlabor Bill Amount: 15.00

Nonlabor Adjustment Amount: 0.00 **Nonlabor Adjustment Percent:** 0.00%

Nonlabor Proposed Amount: 15.00 **Nonlabor Overall Margin:** 0.00%

Summary page (Proposal view)

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

Summary By

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

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

Using the My Proposals Page

This section discusses how to:

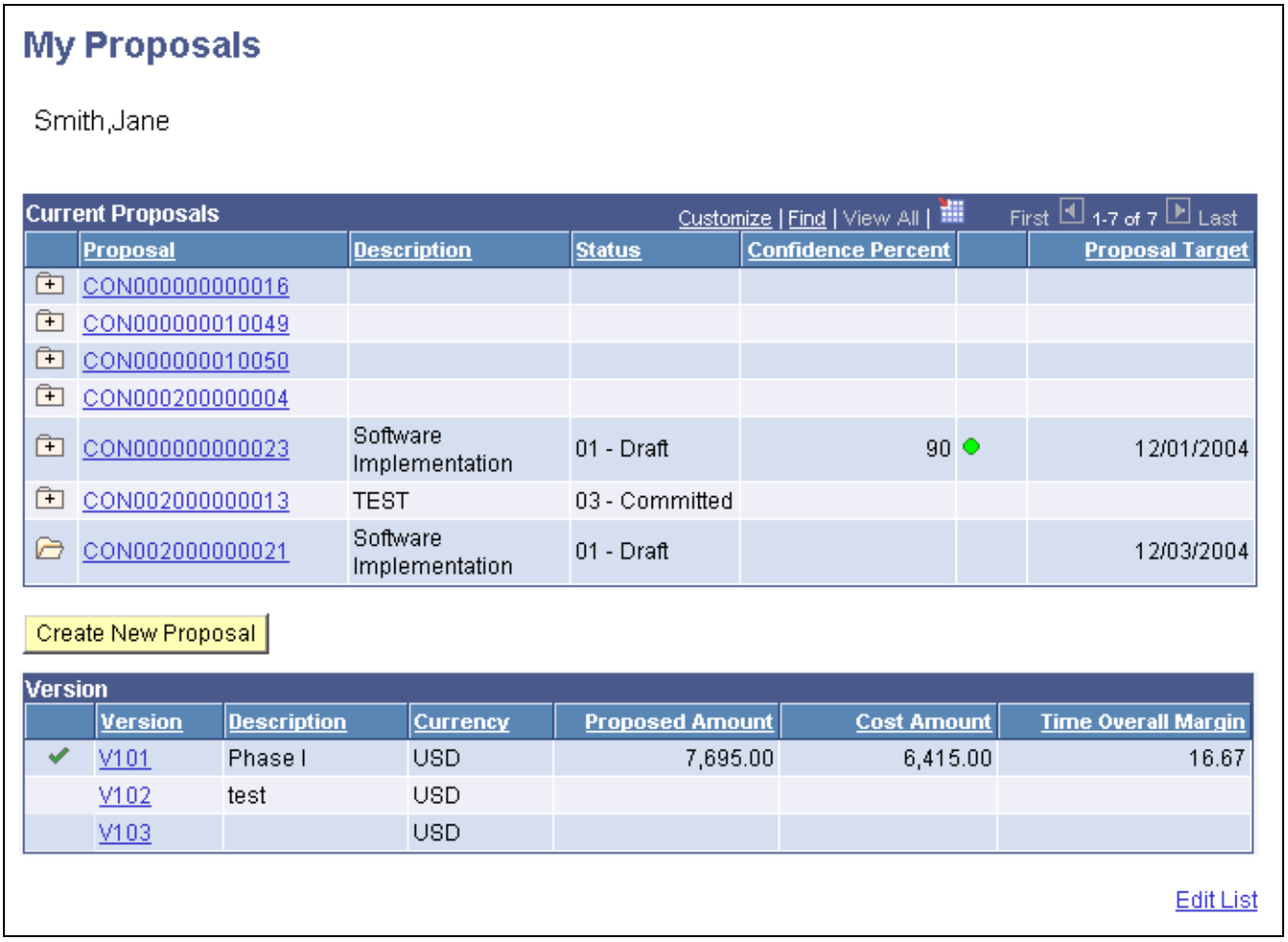
- View proposal information.
- Add and remove proposals from the My Proposal page.

Pages Used to View, Add, and Remove Proposals

Page Name	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 page

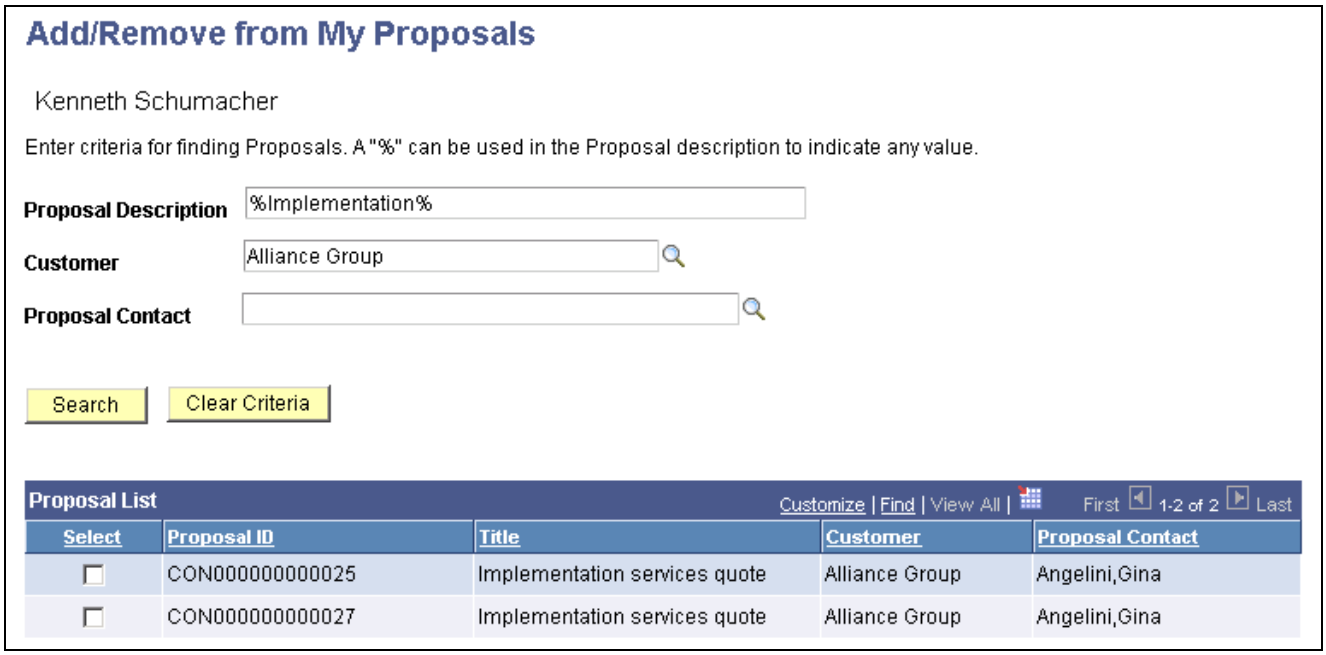
Click the View All related Version Data button to display version information for the proposal.

Proposal Click to access the Maintain Proposal page to view that proposal.

	Indicates a low confidence level.
	Indicates a medium confidence level.
	Indicates a high confidence level.
Create New Proposal	Click to access the Maintain Proposal page to add a new proposal.
Version	Click to access the Resource Estimate page that is associated with the proposal.
Edit List	Click to access the Add/Remove from My Proposals page.

Adding and Removing Proposals

Access the Add/Remove from My Proposals page.



Add/Remove from My Proposals page

Proposal Description, Customer, and **Proposal Contact**	Enter or select information to search for proposals. To find proposals using a partial value, enter the percent sign as a wildcard in the Proposal Description field. For example, to find all proposals beginning with *Implementation,* enter *%Implementation.* This search function is case sensitive.
Select	Select to add proposals to the My Proposals page. To remove proposals, clear this check box.

Viewing CRM-Related Information

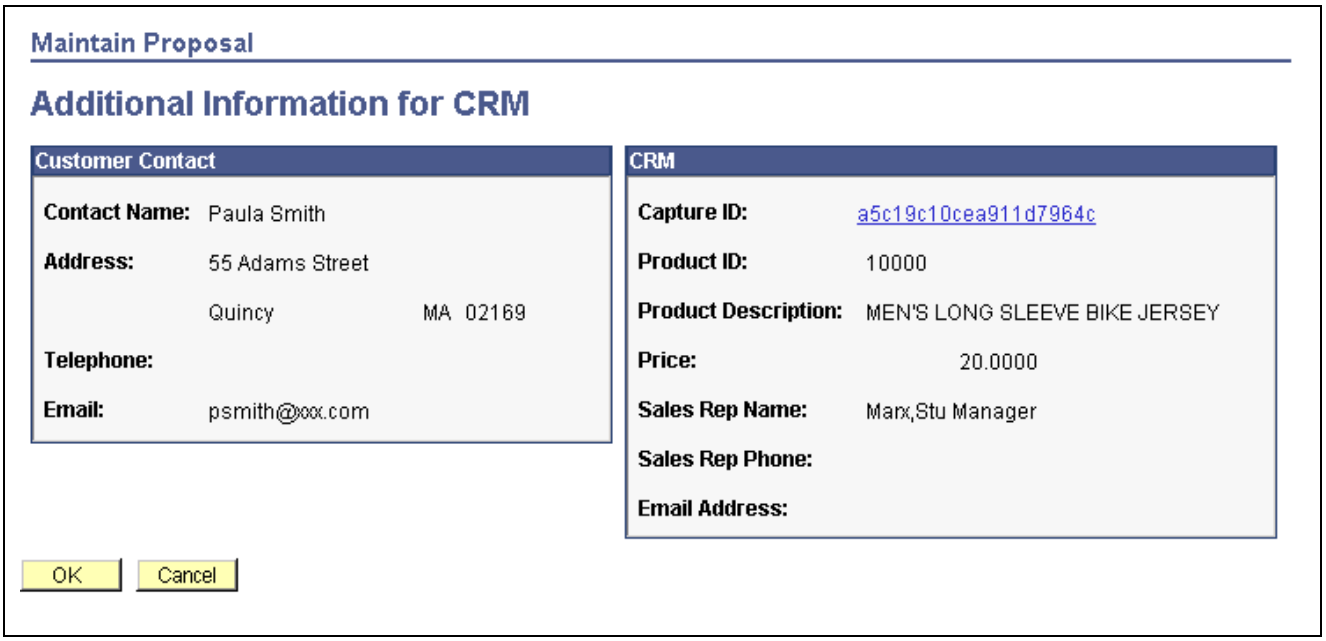
This section discusses how to view CRM-related information.

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.



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 8

Copying Proposals, Versions, and Projects

This chapter provides an overview of the copy functionality in Proposal Management and discusses how to:

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

Understanding the Copy Functionality in Proposal Management

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

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

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

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

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

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

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

Copying Proposal Information

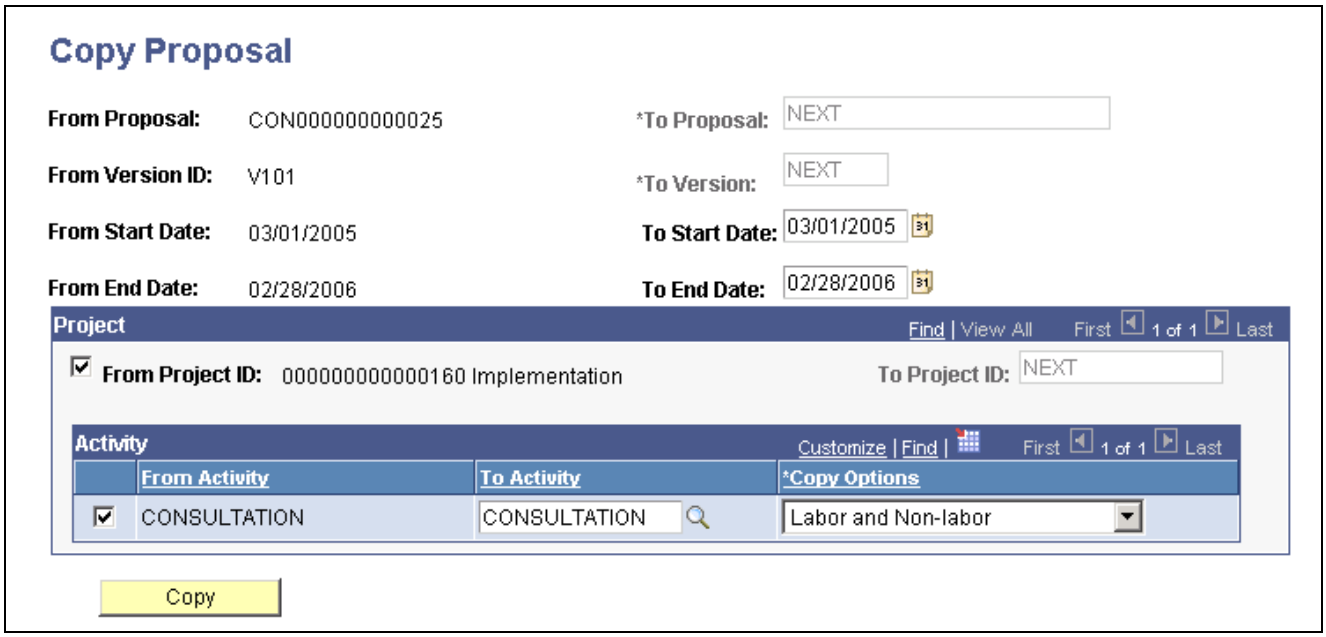
This section discusses how to copy proposal information.

Page Used to Copy Proposal Information

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

Copying Proposal Information

Access the Copy Proposal page.



Copy Proposal page

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

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

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

Project

From Project ID 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 available project ID.

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: *Labor and Non-labor* (system default), *Labor, Non-labor,* or *None.*

Copy Click to initiate the copy process.

Copying Proposal Versions

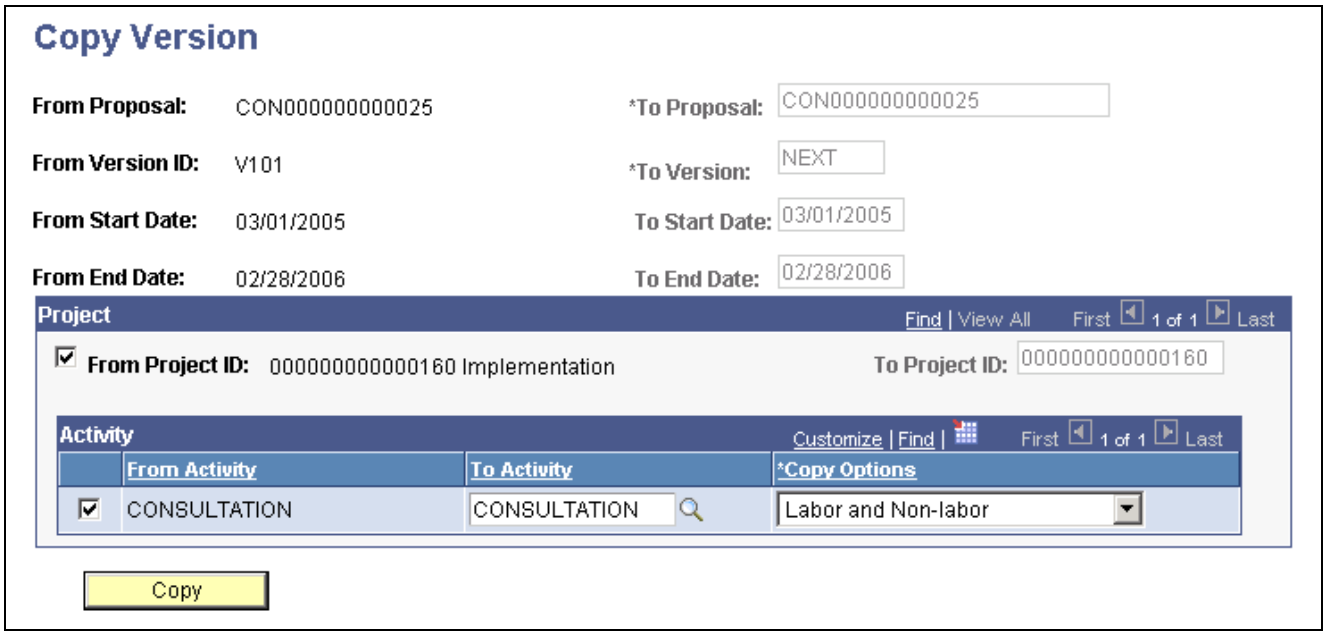
This section discusses how to copy proposal versions.

Page Used to Copy Proposal Versions

Page Name	Object Name	Navigation	Usage
Copy Version	GM_BUD_PPSL_CPY	• Proposal Management, Proposal Management Center, Proposal Management, Maintain Proposal Click the Copy Version button on the Maintain Proposal page. • Proposal Management, Proposal and Version, Maintain Proposal Click the Copy Version button on the Maintain Proposal page.	Copy version information within the same proposal.

Copying Proposal Versions

Access the Copy Version page.



Copy Version page

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

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

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

Project

From Project ID The system automatically selects all projects when you enter this page. 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: *Labor and Non-labor* (system default), *Labor, Non-labor,* or *None.*

Copy Click to initiate the copy process.

Copying Projects

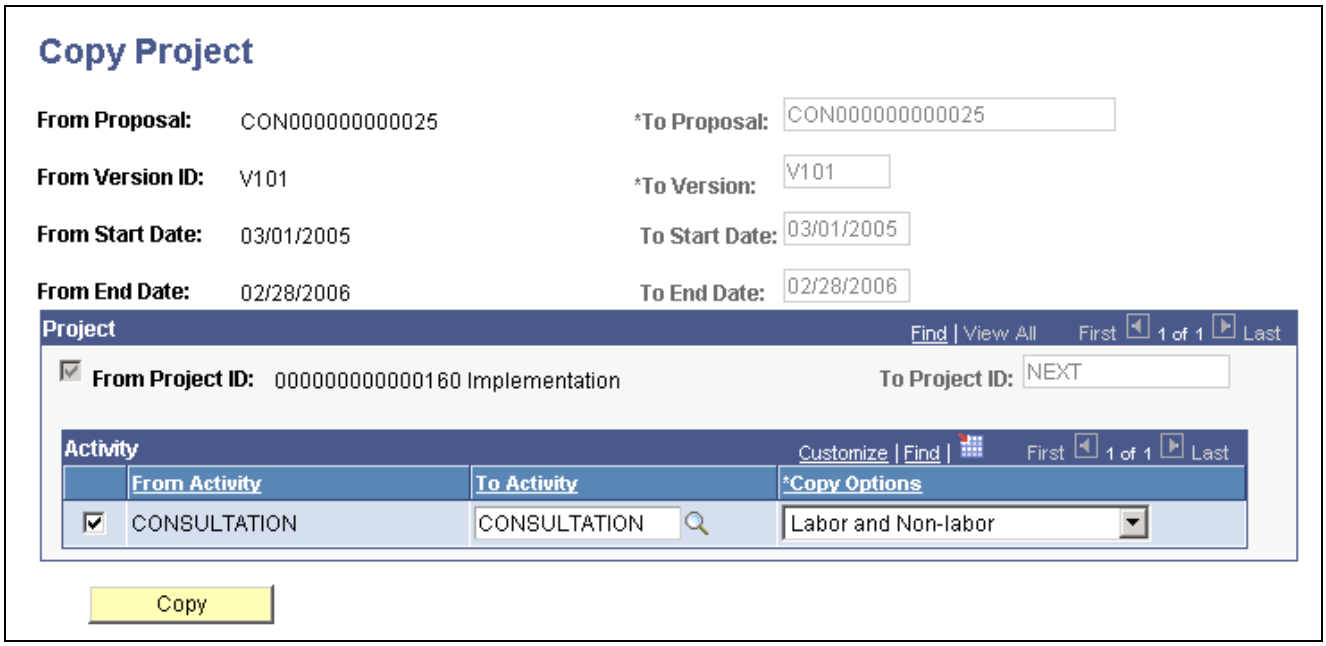
This section discusses how to copy projects.

Page Used to Copy Projects

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

Copying Projects

Access the Copy Project page.



Copy Project page

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

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

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

Project

From Project ID Indicates the value of the source project.

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

Activity

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

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

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

Copy Click to initiate the copy process.

CHAPTER 9

Generating 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

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

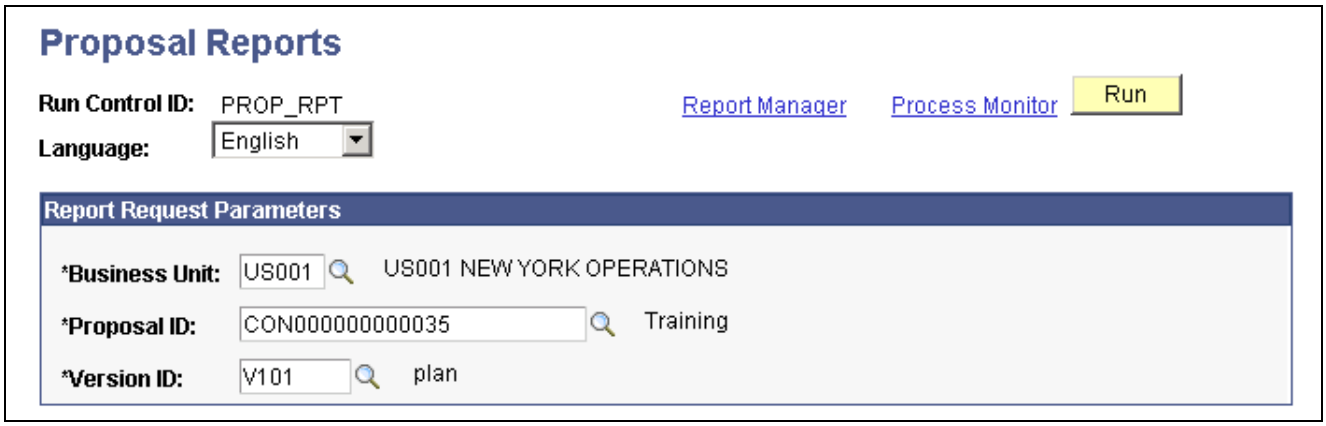
This section discusses how to generate proposal reports.

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.



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 page.

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

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

Generating Labor Resource Reports

This section discusses how to generate resource reports.

Page Used to Generate Labor Resource Reports

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

Generating Labor Resource Reports

Access the Resource Demand Report page.

Resource Demand Report page

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

Retrieving Proposal Information

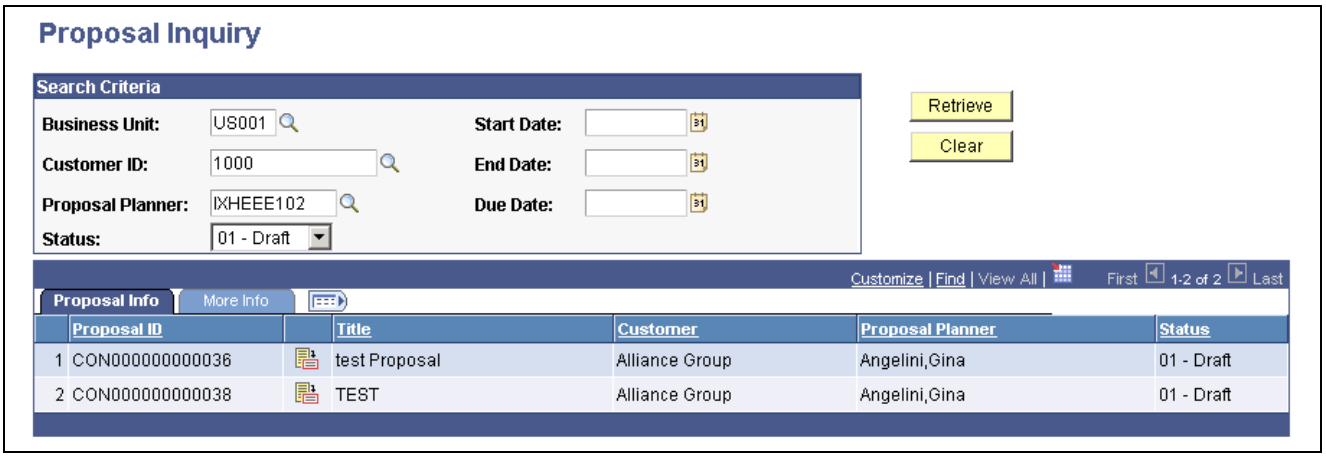
This section discusses how to review and retrieve proposal information.

Page Used to Retrieve Proposal Information

Page Name	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 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 10

Administering Projects

This chapter provides an overview on how projects are used in 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 Proposal Management represents all or a portion of a proposal. Every proposal in the Proposal Management system requires a minimum of one project. The proposal project automatic numbering is the same as for Project Costing, which ensures continuity when the proposal project is generated into a real project.

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

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

See Also

PeopleSoft Enterprise Project Costing 8.9 PeopleBook, "Creating and Maintaining Projects"

Transaction Flow Control

There are two basic ways to control the flow of data coming into 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 Enterprise Project Costing 8.9 PeopleBook.*

See Also

PeopleSoft Enterprise Project Costing 8.9 PeopleBook, "Working with Transactions," Controlling Incoming Transactions

PeopleSoft Enterprise Project Costing 8.9 PeopleBook, "Setting Up Project Costing Control Data"

Project Analysis

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

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

After you establish a project and enter data directly though interfaces with other PeopleSoft applications, you can use the pages in 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 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 General Ledger, Inventory, Payables, Purchasing, and Time and Labor.

Instructions on analyzing project data appear in the *PeopleSoft Enterprise Project Costing 8.9 PeopleBook.*

See Also

PeopleSoft Enterprise Project Costing 8.9 PeopleBook, “Analyzing Projects”

Transaction Review

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 Enterprise Project Costing 8.9 PeopleBook.*

See Also

PeopleSoft Enterprise Project Costing 8.9 PeopleBook, “Analyzing Projects,” Viewing Transactions in Progress

Analysis Inquiries

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 Enterprise Project Costing 8.9 PeopleBook.*

See Also

PeopleSoft Enterprise Project Costing 8.9 PeopleBook, “Analyzing Projects,” Analyzing Projects Using Analysis Inquiries

CHAPTER 11

Integrating with Billing

This chapter provides an overview of the billing process and how it relates to 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

Proposal Management integrates with 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 Billing.	Select Set Up Financials/Supply Chain, Install, Installation Options, Billing GL/AR Options.
Define a Billing business unit.	Select Set Up Financials/Supply Chain, Business Unit Related, Billing, Billing Definition, Business Unit 1.

Step	Navigation
Define a distribution code for unbilled accounts receivable.	Select Set Up Financials/Supply Chain, Common Definitions, Distribution Accounting, Distribution Code.
Create a proposal and generate the contract.	Select Proposal Management, Proposal Management Center, Proposal Management, Maintain Proposal. Click the Generate button on the Maintain Proposal page.
Change the status on the contract to *Active*.	Select Customer Contracts, Create and Amend, General Information, General.
Change the status on the billing plan to *Ready*.	Select Customer Contracts, Create and Amend, General Information, General. Click the Billing Plans link. Then click the Billing Plan ID link.
Create billable rows in Project Costing (you can use either method described here): • Populate the Project Resource table (PROJ_RESOURCE) through the Project Integration process. • Add transactions directly into Project Costing. **Note.** The methods for creating billable rows described are for rate-based billing only.	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.

Process Overview

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

The billing interface can create two types of bills:

- Temporary bills

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

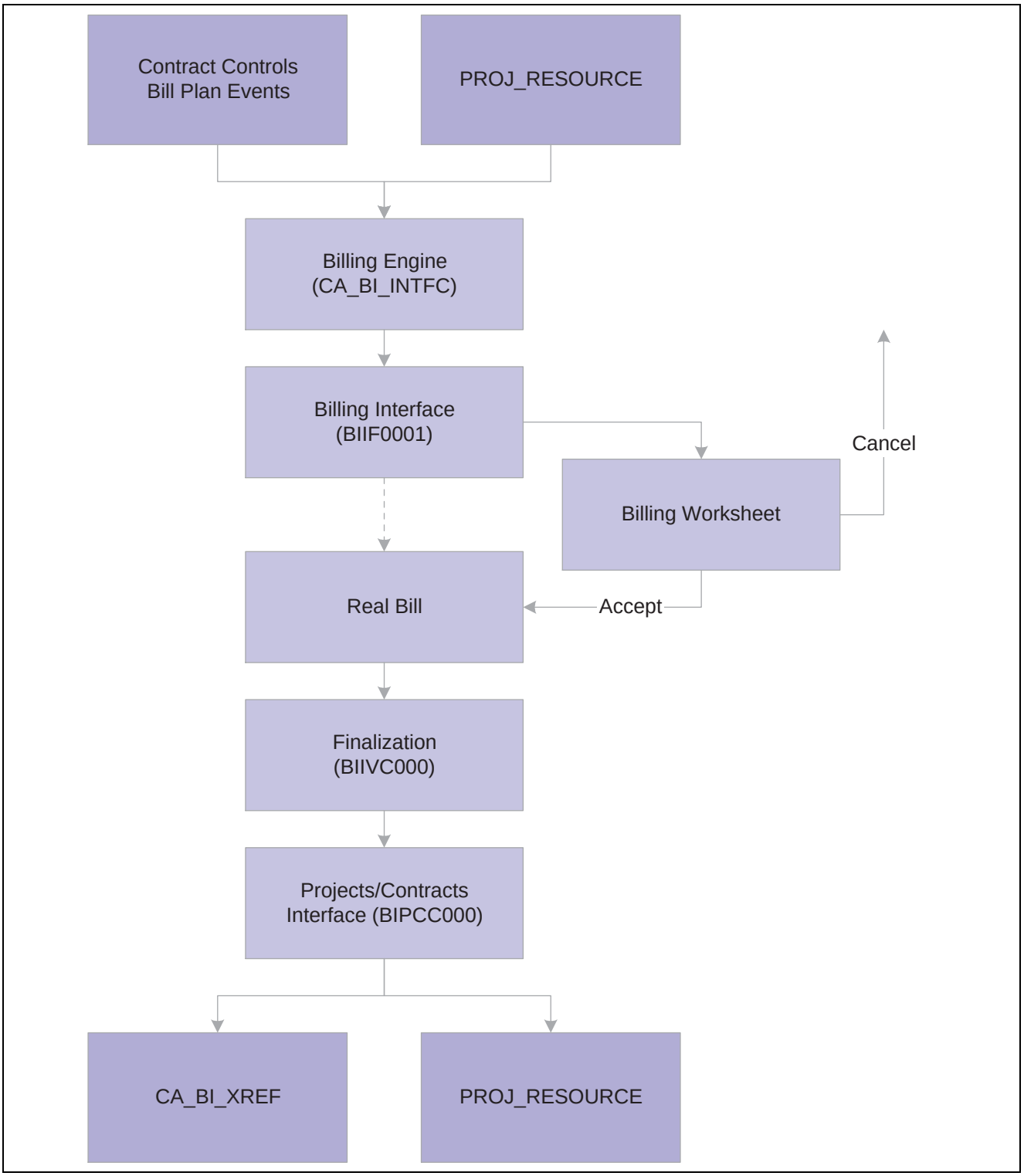
- Real bills

  These bills become invoices that are sent to the customer. You select the option to create temporary or real bills for individual billing plans on the Billing Plan - Billing Plan General page in 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 Project Costing and 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 flowchart illustrates the Billing Interface process (BIIF0001):



Billing Interface process

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

See Also

PeopleSoft Enterprise Billing 8.9 PeopleBook, "Integrating with PeopleSoft Contracts, Project Costing, Grants, and Pay/Bill Management"

PeopleSoft Enterprise Contracts 8.9 PeopleBook, "Setting Up Billing Plans"

The Contracts/Billing Interface Process

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

Instructions about running the Contracts/Billing Interface process are in the *PeopleSoft Enterprise Contracts 8.9 PeopleBook.*

See Also

PeopleSoft Enterprise Contracts 8.9 PeopleBook, "Processing Contracts Billing"

The Billing Interface Process

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

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

Instructions about running the Billing Interface process are in the *PeopleSoft Enterprise Billing 8.9 PeopleBook.*

See Also

PeopleSoft Enterprise Billing 8.9 PeopleBook, "Processing Billing Interface Activity"

PeopleSoft Enterprise Billing 8.9 PeopleBook, "Correcting Billing Interface Process Errors"

PeopleSoft Enterprise Billing 8.9 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 Contracts and Project Costing accordingly.

Instructions about approving billing worksheets are in the *PeopleSoft Enterprise Billing 8.9 PeopleBook.*

See Also

PeopleSoft Enterprise Billing 8.9 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 Contracts and Project Costing accordingly.

Instructions about deleting billing worksheets are in the *PeopleSoft Enterprise Billing 8.9 PeopleBook.*

See Also

PeopleSoft Enterprise Billing 8.9 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 about running the Finalization process are in the *PeopleSoft Enterprise Billing 8.9 PeopleBook.*

See Also

PeopleSoft Enterprise Billing 8.9 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 Contracts and Project Costing with the finalized bill information from Billing.

Instructions about running the Projects/Contracts Interface process are in the *PeopleSoft Enterprise Billing 8.9 PeopleBook.*

See Also

PeopleSoft Enterprise Billing 8.9 PeopleBook, "Integrating with PeopleSoft Contracts, Project Costing, Grants, and Pay/Bill Management," Running the PeopleSoft Billing to Projects/Contracts Interface Process (BIPCC000)

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. Billing supports five calculation methods for creating accounting entries for deferred revenue of transactions when the recognition basis is a date range:

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

See Also

PeopleSoft Enterprise Billing 8.9 PeopleBook, "Processing Deferred Revenue Accounting Entries"

CHAPTER 12

Integrating with Other PeopleSoft Applications

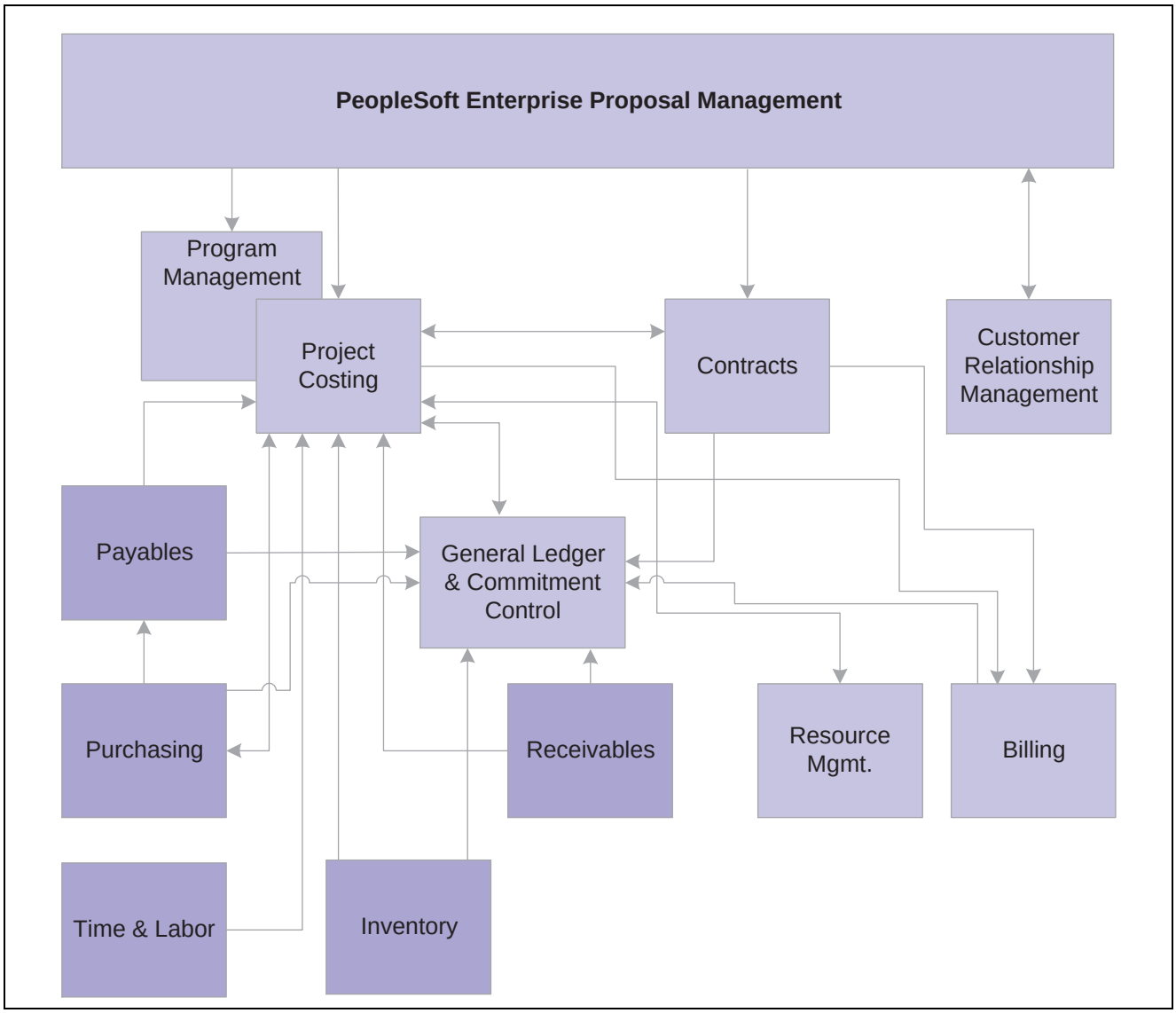
Proposal Management provides a full-featured project estimation tool that integrates directly with Contracts, Project Costing, and Customer Relationship Management (CRM). In addition, Contracts and Project Costing integrate directly with Human Resources, Time and Labor, Billing, General Ledger, Receivables, Purchasing, Inventory, and Payables. You can also integrate Proposal Management with third-party applications.

This chapter provides overviews of integration process flows and the procurement process and discusses how to integrate with:

- PeopleSoft CRM.
- Contracts and Project Costing.
- Program Management.
- Time and Labor.
- General Ledger.
- Receivables.
- Purchasing.
- Inventory.
- Payables.
- Third-party applications.

Understanding Integration Process Flows

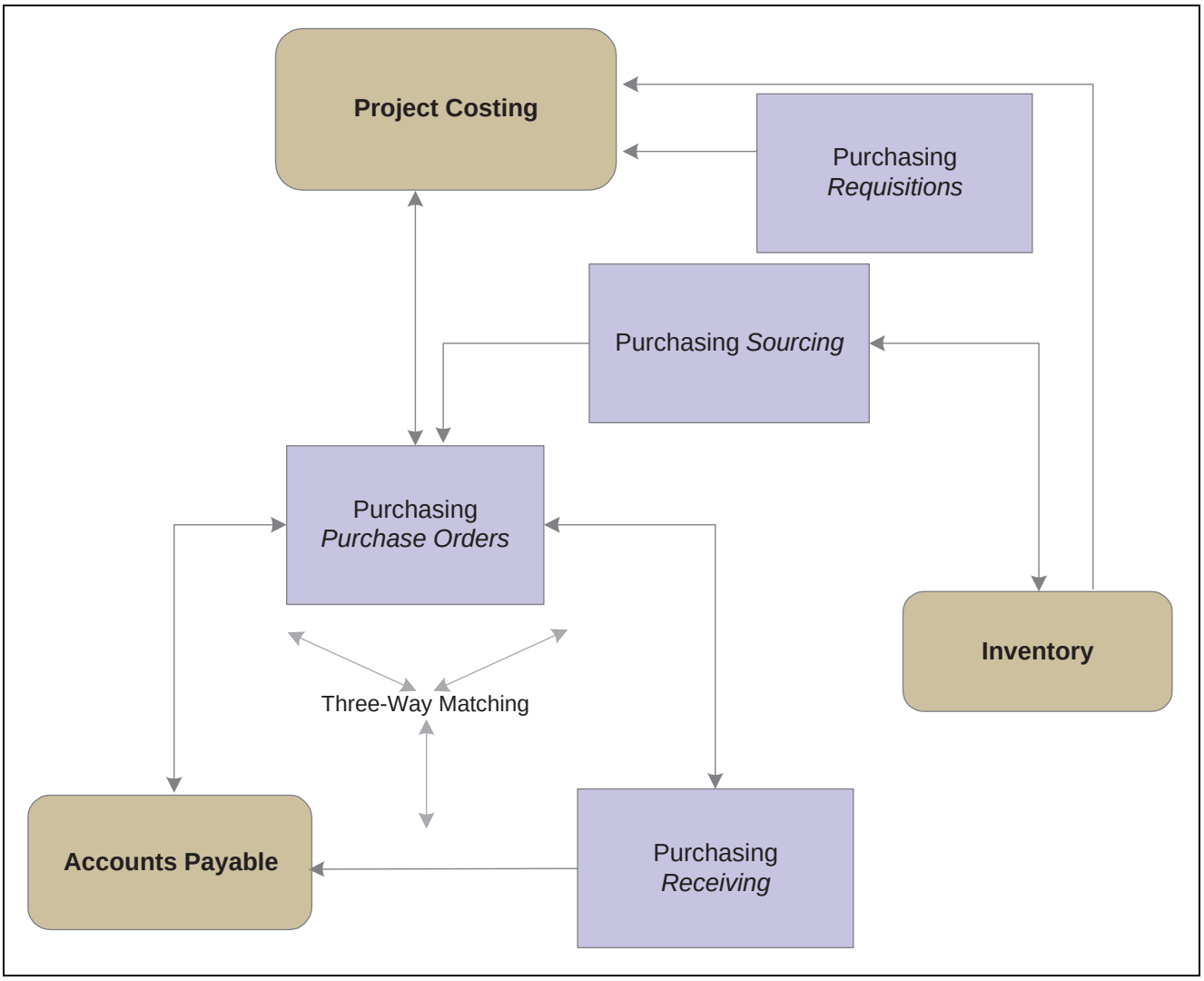
This diagram shows how Proposal Management interacts with the other applications in PeopleSoft Financials and PeopleSoft CRM:



Proposal Management integration with other PeopleSoft applications

Understanding the Procurement Process

You can enter requisitions into Purchasing, and then pull them into Project Costing for tracking purposes. This diagram shows the procurement process flow when Project Costing is integrated with Purchasing, Payables, and Inventory:



The procurement process

Integrating with PeopleSoft Customer Relationship Management

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

The following sections describe the integration points:

Proposal Integration

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

In response to this message, 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 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 **Note.** System uses either record depending on if the quote has a lead or an opportunity attached.	SALES_USER_NAME	GM_PROPOSAL	SALESREP_NAME
Note. System uses PeopleCode to retrieve phone and extension information. Not a direct read of a record.	CC_PHONE_EXTENSION	GM_PROPOSAL	CC_PHONE_EXTENSION
Note. System uses PeopleCode to retrieve email address information. Not a direct read of a record.	EMAIL_ADDR	GM_PROPOSAL	EMAIL_ADDR
RO_ASSOCIATION	PROPOSAL_ID	GM_PROPOSAL	PROPOSAL_ID
RO_ASSOCIATION	VERSION_ID	GM_PROPOSAL	VERSION_ID
RO_HEADER	QUOTE_EXPIRE_DT	GM_PROPOSAL	DUE_DATE
RO_HEADER	DESCR50	GM_PROPOSAL	PROPOSAL_TITLE
RO_HEADER	CAPTURE_DATE	GM_PROPOSAL	BEGIN_DT
RO_HEADER	QUOTE_DUE_DATE	GM_PROPOSAL	END_DT

In response to the first message, the system sends these fields from 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	NA	NA

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

Proposal Management uses the customer number to query the customer table for customer name and current contact information. When 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 Proposal Management from the original quote. Proposal Management checks if the proposal has been closed out (proposal status equals *Canceled*). If it has been closed, the system reopens the proposal for pricing (proposal status is updated to *Draft*).

Quote Integration

When pricing information is completed in 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 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 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

Source = Proposal Management		Target = CRM	
GM_PROPOSAL	TOTAL_BUDGET_AMT	RO_LINE	PRICE
GM_PROP_COMMENT	DESCRLONG	RO_NOTE	DESCRLONG

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

Sales Integration

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

When 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 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
RO_LINE.STATUS	STATUS_CODE	GM_PROPOSAL	SUBMIT_STATUS
RO_NOTE	DESCRLONG	GM_PROP_COMMENT	DESCRLONG

When Proposal Management receives the message, the following occurs:

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

Statuses

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

Proposal Management Status	PeopleSoft CRM Status
Draft	Draft
Ready	Priced

Proposal Management Status	PeopleSoft CRM Status
Draft	Negotiate
Denied	Lost
Committed	Sold
Canceled	Expired

Installation

To activate integration between PeopleSoft CRM and 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 for PeopleSoft Enterprise Financial Management Solutions, Enterprise Service Automation, Asset Lifecycle Management, and Supply Chain Management 8.9 PeopleBook, "Activating Messaging Integration Points"

Enterprise PeopleTools 8.46 PeopleBook: PeopleSoft Integration Broker

Integrating with Contracts, Project Costing, and Program Management

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

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

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

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

- PROJECT
- PROJ_ACTIVITY
- PC_BUD_ITEM
- PC_RATE
- PC_RATE_DTL
- PC_RATE_DTL_LN
- PROJECT_TEAM
- PROJ_TEAM_SCHED
- PROJ_ACT_TEAM
- PC_TEAM_IP_SCHD
- PC_BUD_PLAN
- PC_BUD_DETAIL

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

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

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

See Also

PeopleSoft Enterprise Grants 8.9 PeopleBook, “Establishing Awards and Projects,” Establishing Project Profiles

PeopleSoft Enterprise Grants 8.9 PeopleBook, “Establishing Awards and Projects,” Establishing Project Activities

Integrating with Time and Labor

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

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

It is important to remember when setting up integration between Project Costing and 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 Time and Labor that are populated by integration with 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 Enterprise Project Costing 8.9 PeopleBook, "Integrating with Time and Labor"

Enterprise PeopleTools 8.46 PeopleBook: PeopleSoft Integration Broker

Integrating with General Ledger

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

Single-Sided Transactions

After you create accounting entry templates to generate double-sided entries, run the PC Accounting Distributions process. The PC Accounting Distributions 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 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 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 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 Project Costing with the General Ledger to Projects Interface process (PC_GL_TO_PC).

See Also

PeopleSoft Enterprise Project Costing 8.9 PeopleBook, "Integrating with General Ledger"

Integrating with Commitment Control

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 General Ledger business unit and designate amounts for them. You also define which kinds of transactions you will check against your control budgets. After your budgets are established, you check all of these transactions against your budgets, passing or failing the transactions, depending on the remaining available budget amount and the degree of budgetary control you set up for your budgets.

See Also

PeopleSoft Enterprise Commitment Control 8.9 PeopleBook, "Understanding Commitment Control Integration with PeopleSoft and Third-Party Applications"

Integrating with Receivables

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

The Receivables to Projects process (PC_AR_TO_PC) moves data from Receivables to 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 Enterprise Project Costing 8.9 PeopleBook, "Integrating with Receivables"

Integrating with Purchasing

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

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

See Also

PeopleSoft Enterprise Project Costing 8.9 PeopleBook, "Tracking Procurement Costs"

Integrating with Inventory

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

Inventory then determines whether the demand can be fulfilled. If it cannot be fulfilled, it is sent back to 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 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 Project Costing from Inventory.

See Also

PeopleSoft Enterprise Project Costing 8.9 PeopleBook, "Tracking Procurement Costs," Integrating with Inventory

Integrating with Payables

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

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

See Also

PeopleSoft Enterprise Project Costing 8.9 PeopleBook, "Tracking Procurement Costs," Integrating with Payables

Integrating with Third-Party Systems

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 Project Costing. The requirements include the ability to export the information from the third-party systems into a database table or a flat file, and then import that information into the Project Costing interface tables.

See Also

PeopleSoft Enterprise Project Costing 8.9 PeopleBook, “Integrating with Third-Party Applications”

APPENDIX A

Proposal Management Reports

This appendix provides an overview of 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 9, "Generating Proposal Management Reports," page 69

Proposal Management Reports: A to Z

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

Proposal Management Proposal Reports

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

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

Proposal Management Revenue Pipeline Reports

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

Glossary of PeopleSoft Terms

absence entitlement 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.

absence take This element defines the conditions that must be met before a payee is entitled to take paid time off.

academic career In PeopleSoft Enterprise Campus Solutions, all course work that a student undertakes at an academic institution and that is grouped in a single student record. For example, a university that has an undergraduate school, a graduate school, and various professional schools might define several academic careers—an undergraduate career, a graduate career, and separate careers for each professional school (law school, medical school, dental school, and so on).

academic institution In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.

academic organization In PeopleSoft Enterprise Campus Solutions, an entity that is part of the administrative structure within an academic institution. At the lowest level, an academic organization might be an academic department. At the highest level, an academic organization can represent a division.

academic plan In PeopleSoft Enterprise Campus Solutions, an area of study—such as a major, minor, or specialization—that exists within an academic program or academic career.

academic program In PeopleSoft Enterprise Campus Solutions, the entity to which a student applies and is admitted and from which the student graduates.

accounting class 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.

accounting date 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.

accounting split The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.

accumulator 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.

action reason 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.

action template 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.

activity 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.

address usage In PeopleSoft Enterprise Campus Solutions, a grouping of address types defining the order in which the address types are used. For example, you might define an address usage code to process addresses in the following order: billing address, dormitory address, home address, and then work address.

adjustment calendar In PeopleSoft Enterprise Campus Solutions, the adjustment calendar controls how a particular charge is adjusted on a student's account when the student drops classes or withdraws from a term. The charge adjustment is based on how much time has elapsed from a predetermined date, and it is determined as a percentage of the original charge amount.

administrative function In PeopleSoft Enterprise Campus Solutions, a particular functional area that processes checklists, communication, and comments. The administrative function identifies which variable data is added to a person's checklist or communication record when a specific checklist code, communication category, or comment is assigned to the student. This key data enables you to trace that checklist, communication, or comment back to a specific processing event in a functional area.

admit type In PeopleSoft Enterprise Campus Solutions, a designation used to distinguish first-year applications from transfer applications.

agreement 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.

allocation rule 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.

alternate account 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.

analysis database In PeopleSoft Enterprise Campus Solutions, database tables that store large amounts of student information that may not appear in standard report formats. The analysis database tables contain keys for all objects in a report that an application program can use to reference other student-record objects that are not contained in the printed report. For instance, the analysis database contains data on courses that are considered for satisfying a requirement but that are rejected. It also contains information on

courses captured by global limits. An analysis database is used in PeopleSoft Enterprise Academic Advisement.

Application Messaging PeopleSoft Application Messaging enables applications within the PeopleSoft Enterprise product family to communicate synchronously or asynchronously with other PeopleSoft and third-party applications. An application message defines the records and fields to be published or subscribed to.

AR specialist Abbreviation for *receivables specialist.* In PeopleSoft Receivables, an individual in who tracks and resolves deductions and disputed items.

arbitration plan In PeopleSoft Enterprise Pricer, defines how price rules are to be applied to the base price when the transaction is priced.

assessment rule 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.

asset class An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.

attribute/value pair In PeopleSoft Directory Interface, relates the data that makes up an entry in the directory information tree.

audience In PeopleSoft Enterprise Campus Solutions, a segment of the database that relates to an initiative, or a membership organization that is based on constituent attributes rather than a dues-paying structure. Examples of audiences include the Class of '65 and Undergraduate Arts & Sciences.

authentication server A server that is set up to verify users of the system.

base time period In PeopleSoft Business Planning, the lowest level time period in a calendar.

benchmark job In PeopleSoft Workforce Analytics, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.

billing career In PeopleSoft Enterprise Campus Solutions, the one career under which other careers are grouped for billing purposes if a student is active simultaneously in multiple careers.

bio bit or bio brief In PeopleSoft Enterprise Campus Solutions, a report that summarizes information stored in the system about a particular constituent. You can generate standard or specialized reports.

book In PeopleSoft Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.

branch A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.

budgetary account only 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."

budget check In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.

budget control 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.

budget period 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.

business activity The name of a subset of a detailed business process. This might be a specific transaction, task, or action that you perform in a business process.

business event In PeopleSoft Receivables, defines the processing characteristics for the Receivable Update process for a draft activity.

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).

business process A standard set of 17 business processes are defined and maintained by the PeopleSoft product families and are supported by Business Process Engineering group at PeopleSoft. An example of a business process is Order Fulfillment, which is a business process that manages sales orders and contracts, inventory, billing, and so forth.

See also *detailed business process.*

business task The name of the specific function depicted in one of the business processes.

business unit A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.

buyer 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.

campus In PeopleSoft Enterprise Campus Solutions, an entity that is usually associated with a distinct physical administrative unit, that belongs to a single academic institution, that uses a unique course catalog, and that produces a common transcript for students within the same academic career.

catalog item 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.

catalog map In PeopleSoft Catalog Management, translates values from the catalog source data to the format of the company’s catalog.

catalog partner In PeopleSoft Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.

categorization Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.

category In PeopleSoft Enterprise Campus Solutions, a broad grouping to which specific comments or communications (contexts) are assigned. Category codes are also linked to 3C access groups so that you can assign data-entry or view-only privileges across functions.

channel In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.

ChartField 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.

ChartField balancing You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.

ChartField combination edit The process of editing journal lines for valid ChartField combinations based on user-defined rules.

ChartKey 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.

checkbook 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.

checklist code In PeopleSoft Enterprise Campus Solutions, a code that represents a list of planned or completed action items that can be assigned to a staff member, volunteer, or unit. Checklists enable you to view all action assignments on one page.

class In PeopleSoft Enterprise Campus Solutions, a specific offering of a course component within an academic term.

See also *course.*

Class ChartField 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 *sub-classification.*

clearance In PeopleSoft Enterprise Campus Solutions, the period of time during which a constituent in PeopleSoft Contributor Relations is approved for involvement in an initiative or an action. Clearances are used to prevent development officers from making multiple requests to a constituent during the same time period.

clone In PeopleCode, to make a unique copy. In contrast, to *copy* may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.

cohort In PeopleSoft Enterprise Campus Solutions, the highest level of the three-level classification structure that you define for enrollment management. You can define a cohort level, link it to other levels, and set enrollment target numbers for it.

See also *population* and *division*.

collection 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.

collection rule 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.

comm key See *communication key.*

communication key In PeopleSoft Enterprise Campus Solutions, a single code for entering a combination of communication category, communication context, communication method, communication direction, and standard letter code. Communication keys (also called *comm keys* or *speed keys*) can be created for background processes as well as for specific users.

compensation object 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.

compensation structure In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.

component interface A component interface is a set of application programming interfaces (APIs) that you can use to access and modify PeopleSoft database information using a program instead of the PeopleSoft client.

condition 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.

configuration parameter catalog 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.

configuration plan 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.

constituents In PeopleSoft Enterprise Campus Solutions, friends, alumni, organizations, foundations, or other entities affiliated with the institution, and about which the institution maintains information. The constituent types delivered with PeopleSoft Enterprise Contributor Relations Solutions are based on those defined by the Council for the Advancement and Support of Education (CASE).

content reference 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.

context 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.

In PeopleSoft Enterprise Campus Solutions, a specific instance of a comment or communication. One or more contexts are assigned to a category, which you link to 3C access groups so that you can assign data-entry or view-only privileges across functions.

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.

control table 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.

cost-plus contract line A rate-based contract line associated with a fee component of Award, Fixed, Incentive, or Other. Rate-based contract lines associated with a fee type of None are not considered cost-plus contract lines.

cost profile A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.

cost row A cost transaction and amount for a set of ChartFields.

course In PeopleSoft Enterprise Campus Solutions, a course that is offered by a school and that is typically described in a course catalog. A course has a standard syllabus and credit level; however, these may be modified at the class level. Courses can contain multiple components such as lecture, discussion, and lab.

See also *class*.

course share set

In PeopleSoft Enterprise Campus Solutions, a tag that defines a set of requirement groups that can share courses. Course share sets are used in PeopleSoft Enterprise Academic Advisement.

current learning

In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.

data acquisition

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).

data cube

In PeopleSoft Analytic Calculation Engine, a data cube is a container for one kind of data (such as Sales data) and works with in tandem with one or more dimensions. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and online analytical processing (OLAP) cubes in PeopleSoft Cube Manager.

data elements

Data elements, at their simplest level, define a subset of data and the rules by which to group them.

For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.

dataset

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.

delivery method

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.

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.

delivery method type

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.

detailed business process

A subset of the business process. For example, the detailed business process named Determine Cash Position is a subset of the business process called Cash Management.

dimension

In PeopleSoft Analytic Calculation Engine, a dimension contains a list of one kind of data that can span various contexts, and it is a basic component of an analytic model. Within the analytic model, a dimension is attached to one or more data cubes. In PeopleSoft Cube Manager, a dimension is the most basic component of an OLAP cube and specifies the PeopleSoft metadata to be used to create the dimension's rollup structure. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and OLAP cubes in PeopleSoft Cube Manager.

directory information tree

In PeopleSoft Directory Interface, the representation of a directory's hierarchical structure.

division

In PeopleSoft Enterprise Campus Solutions, the lowest level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a division level, link it to other levels, and set enrollment target numbers for it.

See also *population* and *cohort*.

document sequencing A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.

dynamic detail tree 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.

edit table 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.

effective date 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.

EIM ledger Abbreviation for *Enterprise Incentive Management ledger.* 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.

elimination set In PeopleSoft General Ledger, a related group of intercompany accounts that is processed during consolidations.

entry event 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.

equitization 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.

equity item limit In PeopleSoft Enterprise Campus Solutions, the amounts of funds set by the institution to be awarded with discretionary or gift funds. The limit could be reduced by amounts equal to such things as expected family contribution (EFC) or parent contribution. Students are packaged by Equity Item Type Groups and Related Equity Item Types. This limit can be used to assure that similar student populations are packaged equally.

event 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.

In PeopleSoft Human Resources, also refers to an incident that affects benefits eligibility.

event propagation process 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.

exception In PeopleSoft Receivables, an item that either is a deduction or is in dispute.

exclusive pricing 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.

fact 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.

financial aid term In PeopleSoft Enterprise Campus Solutions, a combination of a period of time that the school determines as an instructional accounting period and an academic career. It is created and defined during the setup process. Only terms eligible for financial aid are set up for each financial aid career.

forecast item 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.

fund 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.

gap In PeopleSoft Enterprise Campus Solutions, an artificial figure that sets aside an amount of unmet financial aid need that is not funded with Title IV funds. A gap can be used to prevent fully funding any student to conserve funds, or it can be used to preserve unmet financial aid need so that institutional funds can be awarded.

generic process type 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.

gift table In PeopleSoft Enterprise Campus Solutions, a table or so-called *donor pyramid* describing the number and size of gifts that you expect will be needed to successfully complete the campaign in PeopleSoft Contributor Relations. The gift table enables you to estimate the number of donors and prospects that you need at each gift level to reach the campaign goal.

GL business unit Abbreviation for *general ledger business unit.* A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books.

See also *business unit*.

GL entry template Abbreviation for *general ledger entry template.* In PeopleSoft Enterprise Campus Solutions, a template that defines how a particular item is sent to the general ledger. An item-type maps to the general ledger, and the GL entry template can involve multiple general ledger accounts. The entry to the general ledger is further controlled by high-level flags that control the summarization and the type of accounting—that is, accrual or cash.

GL Interface process Abbreviation for *General Ledger Interface process.* In PeopleSoft Enterprise Campus Solutions, a process that is used to send transactions from PeopleSoft Enterprise Student Financials to the general ledger. Item types are mapped to specific general ledger accounts, enabling transactions to move to the general ledger when the GL Interface process is run.

group 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.

incentive object 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.

incentive rule 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.

incur In PeopleSoft Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.

initiative In PeopleSoft Enterprise Campus Solutions, the basis from which all advancement plans are executed. It is an organized effort targeting a specific constituency, and it can occur over a specified period of time with specific purposes and goals. An initiative can be a campaign, an event, an organized volunteer effort, a membership drive, or any other type of effort defined by the institution. Initiatives can be multipart, and they can be related to other initiatives. This enables you to track individual parts of an initiative, as well as entire initiatives.

inquiry access In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user only to view data.

See also *update access*.

institution In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.

integration A relationship between two compatible integration points that enables communication to take place between systems. Integrations enable PeopleSoft applications to work seamlessly with other PeopleSoft applications or with third-party systems or software.

integration point An interface that a system uses to communicate with another PeopleSoft application or an external application.

integration set A logical grouping of integrations that applications use for the same business purpose. For example, the integration set ADVANCED_SHIPPING_ORDER contains all of the integrations that notify a customer that an order has shipped.

item 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.

item shuffle In PeopleSoft Enterprise Campus Solutions, a process that enables you to change a payment allocation without having to reverse the payment.

joint communication In PeopleSoft Enterprise Campus Solutions, one letter that is addressed jointly to two people. For example, a letter might be addressed to both Mr. Sudhir Awat and Ms. Samantha Mortelli. A relationship must be established between the two individuals in the database, and at least one of the individuals must have an ID in the database.

keyword In PeopleSoft Enterprise Campus Solutions, a term that you link to particular elements within PeopleSoft Student Financials, Financial Aid, and Contributor Relations.

You can use keywords as search criteria that enable you to locate specific records in a search dialog box.

KPI

An abbreviation for *key performance indicator.* 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.

LDIF file

Abbreviation for *Lightweight Directory Access Protocol (LDAP) Data Interchange Format file.* Contains discrepancies between PeopleSoft data and directory data.

learner group

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.

learning components

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.

learning environment

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.

learning history

In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.

ledger mapping

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 *rates*) 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.

library section

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.

linked section

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.

linked variable

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.

LMS

Abbreviation for *learning management system.* In PeopleSoft Enterprise Campus Solutions, LMS is a PeopleSoft Student Records feature that provides a common set of interoperability standards that enable the sharing of instructional content and data between learning and administrative environments.

load

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.

local functionality

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.

location

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 *1*—is the address you use most often and may be different from the main address.

logistical task

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.

mass change

In PeopleSoft Enterprise Campus Solutions, mass change is a SQL generator that can be used to create specialized functionality. Using mass change, you can set up a series of Insert, Update, or Delete SQL statements to perform business functions that are specific to the institution.

See also *3C engine*.

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.

need
In PeopleSoft Enterprise Campus Solutions, the difference between the cost of attendance (COA) and the expected family contribution (EFC). It is the gap between the cost of attending the school and the student's resources. The financial aid package is based on the amount of financial need. The process of determining a student's need is called *need analysis.*

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.

payment shuffle
In PeopleSoft Enterprise Campus Solutions, a process allowing payments that have been previously posted to a student's account to be automatically reapplied when a higher priority payment is posted or the payment allocation definition is changed.

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.

PeopleCode
PeopleCode is a proprietary language, executed by the PeopleSoft component processor. PeopleCode generates results based on existing data or user actions. By using various tools provided with PeopleTools, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.

PeopleCode event
See *event.*

PeopleSoft Pure Internet Architecture
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.

performance measurement
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.

period context
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.

person of interest
A person about whom the organization maintains information but who is not part of the workforce.

personal portfolio
In PeopleSoft Enterprise Campus Solutions, the user-accessible menu item that contains an individual's name, address, telephone number, and other personal information.

plan

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.

plan context

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.

plan template

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.

planned learning

In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.

planning instance

In PeopleSoft Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.

population

In PeopleSoft Enterprise Campus Solutions, the middle level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a population level, link it to other levels, and set enrollment target numbers for it.

See also *division* and *cohort*.

portal registry

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.

price list

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.

price rule

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.

price rule condition

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.

price rule key

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.

primacy number

In PeopleSoft Enterprise Campus Solutions, a number that the system uses to prioritize financial aid applications when students are enrolled in multiple academic careers and academic programs at the same time. The Consolidate Academic Statistics process uses the primacy number indicated for both the career and program at the institutional level to determine a student's primary career and program. The system also uses the number to determine the primary student attribute value that is used when you extract data to report on cohorts. The lowest number takes precedence.

primary name type In PeopleSoft Enterprise Campus Solutions, the name type that is used to link the name stored at the highest level within the system to the lower-level set of names that an individual provides.

process category In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.

process group 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.

process definition Process definitions define each run request.

process instance 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.

process job 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.

process request 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.

process run control 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.

product A PeopleSoft or third-party product. PeopleSoft organizes its software products into product families and product lines. Interactive Services Repository contains information about every release of every product that PeopleSoft sells, as well as products from certified third-party companies. These products are displayed with the product name and release number.

product category 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.

product family A group of products that are related by common functionality. The family names that can be searched using Interactive Service Repository are PeopleSoft Enterprise, PeopleSoft EnterpriseOne, PeopleSoft World, and third-party, certified PeopleSoft partners.

product line The name of a PeopleSoft product line or the company name of a third-party certified partner. Integration Services Repository enables you to search for integration points by product line.

programs 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.

progress log 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.

project transaction In PeopleSoft Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.

promotion

In PeopleSoft Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.

prospects

In PeopleSoft Enterprise Campus Solutions, students who are interested in applying to the institution.

In PeopleSoft Enterprise Contributor Relations, individuals and organizations that are most likely to make substantial financial commitments or other types of commitments to the institution.

publishing

In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.

rating components

In PeopleSoft Enterprise Campus Solutions, variables used with the Equation Editor to retrieve specified populations.

record group

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.

record input VAT flag

Abbreviation for *record input value-added tax flag*. Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT 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.

record output VAT flag

Abbreviation for *record output value-added tax flag*.

See *record input VAT flag*.

recname

The name of a record that is used to determine the associated field to match a value or set of values.

recognition

In PeopleSoft Enterprise Campus Solutions, the recognition type indicates whether the PeopleSoft Enterprise Contributor Relations donor is the primary donor of a commitment or shares the credit for a donation. Primary donors receive hard credit that must total 100 percent. Donors that share the credit are given soft credit. Institutions can also define other share recognition-type values such as memo credit or vehicle credit.

reference data

In PeopleSoft Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, channels, and so on.

reference object

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).

reference transaction

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.

regional sourcing

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.

relationship object In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.

remote data source data Data that is extracted from a separate database and migrated into the local database.

REN server Abbreviation for *real-time event notification server* in PeopleSoft MultiChannel Framework.

requester In PeopleSoft eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.

reversal indicator In PeopleSoft Enterprise Campus Solutions, an indicator that denotes when a particular payment has been reversed, usually because of insufficient funds.

role 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.

role user 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.

roll up In a tree, to roll up is to total sums based on the information hierarchy.

run control 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.

run control ID A unique ID to associate each user with his or her own run control table entries.

run-level context 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.

SCP SCBM XML message Abbreviation for *Supply Chain Planning Supply Chain Business Modeler Extensible Markup Language message.* PeopleSoft EnterpriseOne Supply Chain Business Modeler uses XML as the format for all data that it imports and exports.

search query 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.

search/match In PeopleSoft Enterprise Campus Solutions and PeopleSoft Enterprise Human Resources Management Solutions, a feature that enables you to search for and identify duplicate records in the database.

seasonal address In PeopleSoft Enterprise Campus Solutions, an address that recurs for the same length of time at the same time of year each year until adjusted or deleted.

section 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.

security event In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.

serial genealogy In PeopleSoft Manufacturing, the ability to track the composition of a specific, serial-controlled item.

serial in production In PeopleSoft Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.

service impact In PeopleSoft Enterprise Campus Solutions, the resulting action triggered by a service indicator. For example, a service indicator that reflects nonpayment of account balances by a student might result in a service impact that prohibits registration for classes.

service indicator In PeopleSoft Enterprise Campus Solutions, indicates services that may be either withheld or provided to an individual. Negative service indicators indicate holds that prevent the individual from receiving specified services, such as check-cashing privileges or registration for classes. Positive service indicators designate special services that are provided to the individual, such as front-of-line service or special services for disabled students.

session In PeopleSoft Enterprise Campus Solutions, time elements that subdivide a term into multiple time periods during which classes are offered. In PeopleSoft Contributor Relations, a session is the means of validating gift, pledge, membership, or adjustment data entry . It controls access to the data entered by a specific user ID. Sessions are balanced, queued, and then posted to the institution's financial system. Sessions must be posted to enter a matching gift or pledge payment, to make an adjustment, or to process giving clubs or acknowledgements.

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.

session template 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.

setup relationship In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.

share driver expression 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.

single signon 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.

source key process In PeopleSoft Enterprise Campus Solutions, a process that relates a particular transaction to the source of the charge or financial aid. On selected pages, you can drill down into particular charges.

source transaction 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.

speed key See *communication key.*

SpeedChart 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.

SpeedType A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.

staging A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.

standard letter code In PeopleSoft Enterprise Campus Solutions, a standard letter code used to identify each letter template available for use in mail merge functions. Every letter generated in the system must have a standard letter code identification.

statutory account Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.

step In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.

storage level 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.

subcustomer qualifier A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.

Summary ChartField 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).

summary ledger 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.

summary time period 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.

summary tree 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 *basis* tree). A summary tree structure specifies the details on which the summary trees are to be built.

syndicate To distribute a production version of the enterprise catalog to partners.

system function In PeopleSoft Receivables, an activity that defines how the system generates accounting entries for the general ledger.

system source The system source identifies the source of a transaction row in the database. For example, a transaction that originates in PeopleSoft Enterprise Expenses contains a system source code of BEX (Expenses Batch).

When PeopleSoft Enterprise Project Costing prices the source transaction row for billing, the system creates a new row with a system source code of PRP (Project Costing pricing), which represents the system source of the new row. System source codes can identify sources that are internal or external to the PeopleSoft system.

For example, processes that import data from Microsoft Project into PeopleSoft applications create transaction rows with a source code of MSP (Microsoft Project).

TableSet 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.

TableSet sharing 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.

target currency The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.

tax authority In PeopleSoft Enterprise Campus Solutions, a user-defined element that combines a description and percentage of a tax with an account type, an item type, and a service impact.

template 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.

territory In PeopleSoft Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.

third party A company or vendor that has extensive PeopleSoft product knowledge and whose products and integrations have been certified and are compatible with PeopleSoft applications.

3C engine Abbreviation for *Communications, Checklists, and Comments engine.* In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists, and comments. You define events and triggers to engage the engine, which runs the mass change and processes the 3C records (for individuals or organizations) immediately and automatically from within business processes.

3C group Abbreviation for *Communications, Checklists, and Comments group.* In PeopleSoft Enterprise Campus Solutions, a method of assigning or restricting access privileges. A 3C group enables you to group specific communication categories, checklist codes, and comment categories. You can then assign the group inquiry-only access or update access, as appropriate.

TimeSpan 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.

trace usage 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.

transaction allocation 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.

transaction state 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.

Translate table 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.

tree 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.

tuition lock In PeopleSoft Enterprise Campus Solutions, a feature in the Tuition Calculation process that enables you to specify a point in a term after which students are charged a minimum (or *locked*) fee amount. Students are charged the locked fee amount even if they later drop classes and take less than the normal load level for that tuition charge.

unclaimed transaction 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.

universal navigation header 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.

update access In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user to edit and update data.

See also *inquiry access.*

user interaction object 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).

variable 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.

VAT exception Abbreviation for *value-added tax exception.* A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.

VAT exempt Abbreviation for *value-added tax exempt.* 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.

VAT exoneration Abbreviation for *value-added tax exoneration.* An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.

VAT suspension Abbreviation for *value-added tax suspension.* An organization that has been granted a temporary exemption from paying VAT.

warehouse A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.

work order 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.

worker A person who is part of the workforce; an employee or a contingent worker.

workset A group of people and organizations that are linked together as a set. You can use worksets to simultaneously retrieve the data for a group of people and organizations and work with the information on a single page.

worksheet 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.

worklist 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.

XML link The XML Linking language enables you to insert elements into XML documents to create a links between resources.

XML schema An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.

XPI Abbreviation for *eXtended Process Integrator.* PeopleSoft XPI is the integration infrastructure that enables both real-time and batch communication with EnterpriseOne applications.

yield by operation In PeopleSoft Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.

zero-rated VAT Abbreviation for *zero-rated value-added tax.* 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 29
activity ID templates 29
Add/Remove from My Proposals page 59, 60
adding
  customers 27
  project roles and rates 28
  proposal contacts 28
  proposal planners 28
additional documentation xii
Additional Information for CRM page 61
adjustments, entering 34
analysis type, definition xx
application fundamentals xi
application messages
  installation 91
  proposal integration 87
  quote integration 89
  sales integration 90
application requirements 2
approving the billing worksheet 82
Attachments page 49, 56
attachments, adding 34, 56

B

BIIVC000 process 83
Bill Estimate - Resource Note page 49
bill rate adjustments 54
billing
  process overview 80
  running the finalization process 83
  system preparation 79
  understanding the process 79
billing business unit 20
billing information, entering 34
Billing Interface process 80, 82
billing interface tables 38
billing plans 38
billing worksheet
  approving 82
  canceling 80
  deleting 82
bills, real 80
BIPCC000 process 83
BU Definition page 16
BU Options page 16
budget generation 40
budget items 30
Budget Items page 29, 30
budget options 48
business processes 4
business units
  contracts 16
  defining 17
  dependency 17
  project costing 15
  understanding 15

C

CA_BI_INTFC process 38, 80
CA_BP_XREF table 80
comments, submitting xvi
common elements xvii
component interfaces
  ACCOUNT_CF 6
  ALTACCT_CF 6
  BUDGET_REF 6
  BUDGET_SCENARIO 8
  CHARTFIELD1 6
  CHARTFIELD2 6
  CHARTFIELD3 7
  CLASS_CF 7
  CONTACT 7
  CUSTOMER_BILLTO_CI 7
  CUSTOMER_GROUP 7
  CUSTOMER_MAIN_CI 7
  CUSTOMER_MISC_CI 7
  CUSTOMER_SHIPTO_CI 7
  CUSTOMER_SOLDTO_CI 7
  DEPT_CF 7
  EM_BUS_UNIT_LED 8
  FUND_CF 7
  IU_INTER_PR_BASIC 7
  IU_INTER_TMPLT 7
  IU_INTRA_TMPLT 8
  MEMBER_PERSON1_CI 8
  MEMBER_TYPE_TABLE_CI 9
  OPER_UNIT_CF 8
  OPR_DEFAULT_FIN 9

PRODUCT_CF 8
PROGRAM_CF 8
PROJECT_CF 8
STATISTICS_CODE 8
TAX_BU_CODE_VAT 9
TAX_CODE_VAT 9
TEAM_MEMBER_TABLE_CI 8
TR_BANK_BRANCH_CI 6
VAT_DEF_CI 9
VAT_ENTITY_ID 9
Confidence Level Setup page 18, 21
confidence levels, defining 17, 21
confidence percentage 43
contact information xvi
contacts 28
contract general information 37
contract generation
process 35
understanding 36
contract legal entity 20
contract lines 16, 37
contract, definition xxi
Contracts BU Setup page 16, 18, 19
Contracts business unit 16
contracts business unit defaults 19
Contracts/Billing Interface process 38, 80, 82
Contracts/Billing Interface Xref table 80
copy project 50
Copy Project page 67
Copy Proposal page 64
Copy Version page 65
copying
projects 67
proposal information 64
proposal versions 65
CRM Information, viewing 60
cross-references xv
Current Bill Rate page 49, 54
Customer Connection website xii
Customer Relationship Management (CRM) 42
customers, adding 27

D

defaults, establishing 17
deferred processing xx
deferred revenue accounting 83
defining
activity ID templates 29
budget items 30
confidence levels 17, 21
contracts business unit defaults 19
key words 31
proposal billing options and security 47
proposal labor defaults 46
proposal management defaults 18
Delete Utilities Tables page 14
documentation
printed xii
related xii
updates xii
double-sided transactions 93

E

employee IDs 24
enterprise integration point (EIP), definition xx
ESA_PROPOSAL_PRICE application message 89
Excel to Component Interface utility 6
expense estimates 48

F

fields, common descriptions xx
finalization process, billing 83
fixed amount product 20

G

Generate process 17, 37
generate status 43
glossary 99
GM_ACTIVITY_PM page 29
GM_ADJUSTB_SECPNL page 54
GM_BU_CONF_SETUP page 21
GM_BU_PM_SETUP page 19
GM_BUD_ITEMS page 30
GM_BUD_PPSL_CPY page
copy projects 67
copy proposals 64
copy versions 65
GM_MY_PROPOSAL page 59
GM_MYOPP_ADD page 59, 60
GM_OPPTY_DOC1 page 49, 56
GM_OPPTY_DTL page 49
GM_OPPTY_HDR page 41, 49
GM_OPPTY_HDR_CRM page 61
GM_OPPTY_HDR_HRS page 46
GM_OPPTY_HDR_SEC page 47

GM_OPPTY_KEYWORD page 49, 57
GM_OPPTY_PRJCT_CTL page 55
GM_OPPTY_SUMMARY page 57
GM_PM_BU_PC page 18
GM_PM_RSRC_EST page 49
GM_PROP_CTR_KEY page 29, 31
GM_PROPOSAL_INQ page 72
GM_SCEN_LINE_NOTE page 49

I

implementation 6
incoming transactions, controlling 76
installation component 13
installation options 13
Installation Options
  Billing - General Options page 14
  Billing - GL/AR Options page 14
  Contracts page 14
  Project Costing Integration page 13
integration template 14, 19
integrations 5
  PeopleSoft Customer Relationship Management 87
  PeopleSoft Enterprise Commitment Control 94
  PeopleSoft Enterprise Contracts 91
  PeopleSoft Enterprise General Ledger 93
  PeopleSoft Enterprise Inventory 95
  PeopleSoft Enterprise Payables 95
  PeopleSoft Enterprise Program Management 91
  PeopleSoft Enterprise Project Costing 91
  PeopleSoft Enterprise Purchasing 94
  PeopleSoft Enterprise Receivables 94
  PeopleSoft Enterprise Time & Labor 92
  process flows 85
  third-party systems 95
INTFC_BI process 80

K

key words 31
key words adding 34
Keywords page 49, 57
keywords, adding 57

L

Labor Configuration page 46
limit access to proposals 23

M

Maintain Proposal page 41, 49
Maintain Version Estimate Detail page 49
minimum bill amount 20
MMA Partners xii
My Proposals page 59

N

navigation 11
notes xv

O

OC_ESA_PROPOSAL application message 87
OC_ESA_PROPOSAL_RESPONSE application message 88
OC_ESA_PROPOSAL_STATUS application message 90
operational structure, defining 13

P

PC_BUD_ITEMS page 29
PeopleBooks
  ordering xii
PeopleCode, typographical conventions xiv
PeopleSoft application fundamentals xi
permission lists 23
PM1100 report 97
PM1110 report 97
PM1120 report 97
PM1200 report 98
PM1210 report 98
PM1310 report 97
PM1400 report 98
PM1410 report 98
pre-spending 36, 44
prerequisites xi
pricing method 51
printed documentation xii
procurement process 86
Product Definition - Contracts Options page 16
Product Definition page 38
products
  fixed amount 16
  rate based 16

understanding 16
PROJ_RESOURCE table 75, 80
project control 75
project control details, entering 55
Project Control page 49, 55
Project Costing BU Setup page 15
Project Costing business unit 15
Project Costing Definition page 15
Project Costing Integration page 13
Project Costing Options page 15
project delete utility 14, 36
project roles and rates 28
project team, create 52
project teams, understanding 35
project, definition xxi
projects
administering 75
analysis inquiries 77
analyzing 76
copying 67
defining 75
setting up 75
transaction review 77
projects and activities 39
Projects BU page 18
Projects/Contracts Interface process 83
proposal
definition xxi
generate 33
prepare 33
proposal billing options and security 47
proposal contacts 28
proposal ID, definition xxi
proposal information, copying 64
Proposal Inquiry page 72
Proposal Key Words page 29, 31
proposal management
business processes 4
implementation 6
integrations 5
navigating in 11
overview 1
proposal management defaults 18
proposal management information, establishing 29
proposal planners 28
proposal preparation process, understanding 33
Proposal Reports page 69
proposal versions
copying 65
new 35
proposals
adding and removing 60
expense summary 45
generation 41
overall summary 44
preparation 41
status 42
time summary 45
viewing 59

R

rate based product 20
rate options 48
related documentation xii
reports
by confidence in quartile 98
by confidence in tenths 98
by customer name 98
by status 98
fixed fee 97
fixed fee itemized 97
generating 69
internal 97
pipeline 70
proposal 69
resource demand 71
resource demand by role 97
understanding 69
Resource Demand Report page 71
Resource Estimate page 49
resource summary, viewing 57
resource transaction, definition xxi
resource type, definition xxi
retrieving proposal information 72
Revenue Pipeline Reports page 70
revenue recognition plans 38
RUN_GM_PL_RPT page 70
RUN_GM_PROP_RPT page 69
RUN_GM_RES_RPT page 71

S

search records 24
search records, security 24
security
by department ID 24
by user ID 24
multilevel 23

understanding 23
Set Up Options page 46, 47
setup manager 6
single-sided transactions 93
status, definition xxii
statuses
customer relationship management 90
proposal management 90
structure, understanding 27
suggestions, submitting xvi
Summary page 49, 57

T

temporary bills 80
terms 99
time
calculate 34
estimates 34, 48
trees
department 24
node-oriented 24
Proposal Management security 24
typographical conventions xiv

U

unit of measure 31
user roles 23

V

version, definition xxii
visual cues xv

W

warnings xv