

PeopleSoft®

PeopleSoft Enterprise Proposal Management 8.9 Reports

July 2005

PeopleSoft Enterprise Proposal Management 8.9 Reports
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About This PeopleBook Preface

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

This preface discusses:

- Related documentation.
- Comments and suggestions.

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>

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- Web
- Telephone
- Email

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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.

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See Also

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

Comments and Suggestions

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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.

CHAPTER 1

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.

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

CHAPTER 2

Report Samples

This chapter provides report samples.

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



Report ID: PM1100
 User ID: DVP1
 Run Control: 1

PeopleSoft Proposal Management
Proposal: Fixed Fee

Page No. 1
 Run Date 7/8/2005
 Run Time 1:18:10 PM

Business Unit	US001	US001 NEW YORK OPERATIONS
Proposal:	CON000000000036	Implementation services quote
Version:	V101	Oracle Implementation
Customer:	1000	Alliance Group

Project: 000000000000166 Implementation

Labor

Activity	Project Role	Quantity
CA IMPLEMENT	EUR PROJ MNGR	1.00
	PROJ CONSULTANT	10.00
CONSULTATION	PROJ MANAGER	1.00
	FUNC ANALYST	1.00

Non-Labor

Activity	Description	Quantity
CONSULTATION	Compaq Armada M700	24.00
	Refrigerator, Inside Heat Exch	120.00

Project Proposed Labor Total:	839,509.92
Project Proposed Non-Labor Total:	381.36

Project: 000000000000167 Implementation 2

Labor

Activity	Project Role	Quantity
CA IMPLEMENT	EUR PROJ MNGR	1.00
	PROJ CONSULTANT	10.00
CONSULTATION	PROJ MANAGER	1.00
	FUNC ANALYST	1.00

Non-Labor

Activity	Description	Quantity
CONSULTATION	Compaq Armada M700	24.00
	Refrigerator, Inside Heat Exch	120.00

Project Proposed Labor Total:	839,509.92
Project Proposed Non-Labor Total:	381.36

Grand Total:	<u>Proposed Labor</u>	<u>Proposed Non-Labor</u>	<u>Proposed Total</u>
	1,679,019.84	762.72	1,679,782.56



Report ID: PM1110
 User ID: DVP1
 Run Control: 1

PeopleSoft Proposal Management
Proposal: Fixed Fee Itemized

Page No. 1
 Run Date 7/11/2005
 Run Time 9:30:44 AM

Business Unit:	US001	US001 NEW YORK OPERATIONS
Proposal:	CON000000000036	Implementation services quote
Version:	V101	Oracle Implementation
Customer:	1000	Alliance Group

Project:	000000000000166	Implementation
-----------------	-----------------	----------------

Asset

Activity	Description	Quantity	Amount
CONSULTATION	Compaq Armada M700	24.00	24.00
Subtotal:			24.00

Labor

Activity	Project Role	Quantity	Amount
CA IMPLEMENT	EUR PROJ MNGR	1.00	40,309.92
	PROJ CONSULTANT	10.00	600,000.00
CONSULTATION	PROJ MANAGER	1.00	148,800.00
	FUNC ANALYST	1.00	50,400.00
Subtotal:			839,509.92

Material

Activity	Description	Quantity	Amount
CONSULTATION	Refrigerator, Inside Heat Exc	120.00	357.36
Subtotal:			357.36

Project Labor Total:	839,509.92
Project Labor Adjustment:	0.00
Project Proposed Labor Total:	839,509.92
Project Non-Labor Total:	381.36
Project Non-Labor Adjustment:	0.00
Project Proposed Non-Labor Total:	381.36



Report ID: PM1120
 User ID: DVP1
 Run Control: 1

PeopleSoft Proposal Management
Proposal: Internal

Page No. 1
 Run Date 7/11/2005
 Run Time 9:27:42 AM

Business Unit:	US001	US001 NEW YORK OPERATIONS
Proposal:	CON000000000036	Implementation services quote
Version:	V101	Oracle Implementation
Customer:	1000	Alliance Group

Project:	000000000000166	Implementation
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Labor					
Activity	Project Role	Quantity	Bill Amount	Cost Amount	Margin
CA IMPLEMENT	EUR PROJ MNGR	1.00	40,309.92	23,405.76	41.94
	PROJ CONSULTANT	10.00	600,000.00	264,000.00	56.00
CONSULTATION	PROJ MANAGER	1.00	148,800.00	86,400.00	41.94
	FUNC ANALYST	1.00	50,400.00	33,600.00	33.33
Subtotal:			839,509.92	407,405.76	

Non-Labor					
Activity	Description	Quantity	Bill Amount	Cost Amount	Margin
CONSULTATION	Compaq Armada M700	24.00	24.00	24.00	0.00
	Refrigerator, Inside Heat Exch	120.00	357.36	357.36	0.00
Subtotal:			381.36	381.36	

Project Labor Total:	839,509.92	407,405.76	
Project Labor Adjustment:	0.00		
Project Proposed Labor Total:	839,509.92		51.47
Project Non-Labor Total:	381.36	381.36	
Project Non-Labor Adjustment:	0.00		
Project Proposed Non-Labor Total:	381.36		0.00

Project:	000000000000167	Implementation 2
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Labor					
Activity	Project Role	Quantity	Bill Amount	Cost Amount	Margin
CA IMPLEMENT	EUR PROJ MNGR	1.00	40,309.92	23,405.76	41.94
	PROJ CONSULTANT	10.00	600,000.00	264,000.00	56.00
CONSULTATION	PROJ MANAGER	1.00	148,800.00	86,400.00	41.94
	FUNC ANALYST	1.00	50,400.00	33,600.00	33.33
Subtotal:			839,509.92	407,405.76	

Non-Labor					
Activity	Description	Quantity	Bill Amount	Cost Amount	Margin
CONSULTATION	Compaq Armada M700	24.00	24.00	24.00	0.00
	Refrigerator, Inside Heat Exch	120.00	357.36	357.36	0.00
Subtotal:			381.36	381.36	

Project Labor Total:	839,509.92	407,405.76	
Project Labor Adjustment:	0.00		
Project Proposed Labor Total:	839,509.92		51.47
Project Non-Labor Total:	381.36	381.36	
Project Non-Labor Adjustment:	0.00		
Project Proposed Non-Labor Total:	381.36		0.00



Report ID: PM1310
 User ID: VP1
 Run Control: TEST

PeopleSoft Proposal Management
 Resource Demand: By Role

Page No. 1
 Run Date 7/11/2005
 Run Time 1:51:58 PM

<u>Business Unit:</u>	US001	US001 NEW YORK OPERATIONS	<u>Confidence:</u>	1	TO	100
<u>Status:</u>	Draft		<u>Date Range:</u>	1/1/2005	TO	12/31/2006

US Dollar

<u>Project Role</u>	<u>Avg Bill Rate</u>	<u>Avg Cost Rate</u>	<u>Margin</u>	<u>Quantity</u>
Current Project Manager	310.00	180.00	41.94	1.00
Functional Analyst	210.00	140.00	33.33	1.00

<u>Overall Avg Bill Rate</u>	<u>Overall Avg Cost Rate</u>	<u>Avg. Margin</u>	<u>Total</u>
262.63	161.05	38.68	2.00



Report ID: PM1200
 User ID: VP1
 Run Control: PROP_RPT

PeopleSoft Proposal Management
Revenue Pipeline Report: By Confidence in Tenths

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

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

US Dollar

Confidence Range: 71 - 80

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



Report ID: PM1210
 User ID: VP1
 Run Control: PROP_RPT

PeopleSoft Proposal Management
Revenue Pipeline Report: By Confidence in Quartile

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

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

US Dollar

Confidence Range: Fourth Quartile (76 to 100)

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

Total Proposed Amount	Total Cost	Avg. Margin
1,223,800.00	672,000.00	45.09



Report ID: PM1410
 User ID: VP1
 Run Control: PROP_RPT

PeopleSoft Proposal Management
Revenue Pipeline Report: By Status

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

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

US Dollar

Status: Committed

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

Total Proposed Amount	Total Cost	Avg. Margin
1,223,800.00	672,000.00	45.09



Report ID: PM1400
 User ID: VP1
 Run Control: PROP_RPT

PeopleSoft Proposal Management
Revenue Pipeline Report: By Customer Name

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

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

US Dollar

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

Total Proposed Amount	Total Cost	Avg. Margin
1,223,800.00	672,000.00	45.09