

Oracle® Proposals

Implementation Guide

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Oracle Proposals Implementation Guide, Release 12.1

Part No. E13442-04

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Primary Author: Debjit Nag

Contributor: Harish Ekkirala, Robert Carini

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Send Us Your Comments

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Oracle welcomes customers' comments and suggestions on the quality and usefulness of this document. Your feedback is important, and helps us to best meet your needs as a user of our products. For example:

- Are the implementation steps correct and complete?
- Did you understand the context of the procedures?
- Did you find any errors in the information?
- Does the structure of the information help you with your tasks?
- Do you need different information or graphics? If so, where, and in what format?
- Are the examples correct? Do you need more examples?

If you find any errors or have any other suggestions for improvement, then please tell us your name, the name of the company who has licensed our products, the title and part number of the documentation and the chapter, section, and page number (if available).

Note: Before sending us your comments, you might like to check that you have the latest version of the document and if any concerns are already addressed. To do this, access the new Oracle E-Business Suite Release Online Documentation CD available on My Oracle Support and www.oracle.com. It contains the most current Documentation Library plus all documents revised or released recently.

Send your comments to us using the electronic mail address: appsdoc_us@oracle.com

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Preface

Intended Audience

Welcome to Release 12.1 of the *Oracle Proposals Implementation Guide*.

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

- The principles and customary practices of your business area.
- Oracle Proposals - If you have never used Oracle Proposals, Oracle suggests you attend one or more of the Oracle Proposals training classes available through Oracle University.
- The Oracle Applications graphical user interface - To learn more about the Oracle Applications graphical user interface, read the Oracle E-Business Suite User's Guide.
- See Other Information Sources for more information about Oracle Applications product information.

How To Use This Guide

- Introduction - provides an overview of Oracle Proposals and describes its features.
- Before You Begin- provides an overview of what you need to have installed, implemented, and verified before implementing Oracle Proposals.
- Implementation Tasks for Oracle Proposals - summarizes the steps and lists the tasks for implementing Oracle Proposals.
- Oracle Proposals Integrations - explains Oracle Proposals integration with other Oracle products and third party integration.

In addition, the following appendices are included in this guide:

- Oracle Proposals Profile Options
- Permissions for Oracle Content Manager
- Seeded Views

Other Information Sources

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

See Related Information Sources on page ix for more Oracle E-Business Suite product information.

Deaf/Hard of Hearing Access to Oracle Support Services

To reach Oracle Support Services, use a telecommunications relay service (TRS) to call Oracle Support at 1.800.223.1711. An Oracle Support Services engineer will handle technical issues and provide customer support according to the Oracle service request process. Information about TRS is available at <http://www.fcc.gov/cgb/consumerfacts/trs.html>, and a list of phone numbers is available at <http://www.fcc.gov/cgb/dro/trsphonebk.html>.

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Structure

- 1 Introduction
- 2 Before You Begin
- 3 Implementation Tasks for Oracle Proposals
- 4 Oracle Proposals Integrations
- A Oracle Proposals Profile Options
- B Permissions for Oracle Content Manager
- C Seeded Views

Related Information Sources

Integration Repository

The Oracle Integration Repository is a compilation of information about the service endpoints exposed by the Oracle E-Business Suite of applications. It provides a complete catalog of Oracle E-Business Suite's business service interfaces. The tool lets users easily discover and deploy the appropriate business service interface for integration with any system, application, or business partner.

The Oracle Integration Repository is shipped as part of the E-Business Suite. As your instance is patched, the repository is automatically updated with content appropriate for the precise revisions of interfaces in your environment.

Online Documentation

All Oracle E-Business Suite documentation is available online (HTML or PDF).

- **PDF** - See the Oracle E-Business Suite Documentation Library for current PDF documentation for your product with each release. The Oracle E-Business Suite Documentation Library is also available on My Oracle Support and is updated frequently
- **Online Help** - Online help patches (HTML) are available on My Oracle Support.
- **Release Notes** - For information about changes in this release, including new features, known issues, and other details, see the release notes for the relevant product, available on My Oracle Support.
- **Oracle Electronic Technical Reference Manual** - The Oracle Electronic Technical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for each Oracle E-Business Suite product. This information helps you convert data from your existing applications and integrate Oracle E-Business Suite data with non-Oracle applications, and write

custom reports for Oracle E-Business Suite products. The Oracle eTRM is available on My Oracle Support.

Guides Related to All Products

Oracle E-Business Suite User's Guide

This guide explains how to navigate, enter data, query, and run reports using the user interface (UI) of Oracle E-Business Suite. This guide also includes information on setting user profiles, as well as running and reviewing concurrent programs.

You can access this guide online by choosing "Getting Started with Oracle Applications" from any Oracle E-Business Suite product help file.

Guides Related to This Product

Oracle Marketing Implementation Guide

Oracle Marketing provides the tools necessary to automate the planning, budgeting, execution, and tracking of your marketing initiatives. It provides a single repository of customer information that enables you to analyze, personalize, refine, and target your campaigns to better align with sales. You can set up fatigue rules to define contact limits by time period and by channel.

Oracle Proposals User Guide

Oracle Proposals enables you to create templates and use them to create proposals to help position a product or service as a solution to the customer's business needs. You send proposals by email, including supporting documents, to prospective customers. This guide describes how to create templates of different categories and use these to create proposals from a lead in Oracle Sales, an opportunity in Oracle Telesales or Oracle Sales, or a customer in Oracle Telesales. You can also associate a proposal to a campaign activity in Oracle Marketing.

Oracle Quoting Implementation Guide

Oracle Quoting enables organizations propose product solutions and negotiate prices, while enforcing consistent business rules throughout the sales cycle. This guide describes how to set up quote statuses to indicate the evolution of a quote to an order, define status transition rules, set up defaults for an operating unit, and define credit check rules. You must also set up integration with Oracle Sales Contracts, Oracle Incentive Compensation, Oracle Territory Manager, and Oracle Approvals Management.

Oracle Sales Implementation Guide

This guide enables you to set up users, user groups, and roles, define forecast categories

that group products and services to be included in a forecast, set up and enable currency conversion, and set up the sales dashboard linking the sales funnel to sales stages of a sales methodology. You can also set up Oracle Sales and Oracle Telesales interoperability and set up Oracle Sales for integration with Oracle Territory Manager, Oracle Marketing, Oracle Quoting, Oracle Proposals, Oracle Trade Management, Oracle Partner Management, and Oracle Incentive Compensation.

Oracle Sales User Guide

Oracle Sales enables sales professionals plan and manage the sales process from leads to opportunities to quotes including the tracking of competitors for products within opportunities. It is integrated in the E-Business Suite and optimized for use with wireless. You can use the sales dashboard to view open opportunities, proposals, quotes, top customers, leads by age and by campaign, the latest sales forecast, and your calendar tasks.

Oracle TeleSales Implementation Guide

This guide describes how you can set up Oracle TeleSales so telesales agents can convert a sales inquiry or a customer call into an order. You must set up agent and customer interaction tracking, enable web directory assistance for agents, enable web collaboration, set up opportunity forecasting so agents enter forecast amounts for a product line and receive sales credits, and set up marketing source codes to track the marketing activity responsible for a sale or a sales activity. Oracle TeleSales interacts with Oracle Scripting, Oracle Email Center, Oracle Marketing, Oracle Territory Manager, Oracle Product Lifecycle Management, Oracle One-to-One Fulfillment, Oracle Universal Work Queue, Oracle Sales, and Oracle Quoting.

Oracle Territory Manager Implementation Guide

With Oracle Territory Manager, you can create geographic territories, account territories, and sales territories using predefined matching attributes to identify territories such as the geographic matching attribute of country. You can also create territory hierarchies to make the territory assignments and searches more efficient. Before you implement Oracle Territory Manager, you must define the purpose of defining territories for your business, the level of usage that the resources assigned to territories may require, and the requirement for overlays.

Installation and System Administration

Maintaining Oracle E-Business Suite Documentation Set

This documentation set provides maintenance and patching information for the Oracle E-Business Suite DBA. *Oracle E-Business Suite Maintenance Procedures* provides a description of the strategies, related tasks, and troubleshooting activities that will help ensure the continued smooth running of an Oracle E-Business Suite system. *Oracle E-Business Suite Maintenance Utilities* describes the Oracle E-Business Suite utilities that

are supplied with Oracle E-Business Suite and used to maintain the application file system and database. It also provides a detailed description of the numerous options available to meet specific operational requirements. *Oracle E-Business Suite Patching Procedures* explains how to patch an Oracle E-Business Suite system, covering the key concepts and strategies. Also included are recommendations for optimizing typical patching operations and reducing downtime.

Oracle Alert User's Guide

This guide explains how to define periodic and event alerts to monitor the status of your Oracle E-Business Suite data.

Oracle E-Business Suite Concepts

This book is intended for all those planning to deploy Oracle E-Business Suite Release 12, or contemplating significant changes to a configuration. After describing the Oracle E-Business Suite architecture and technology stack, it focuses on strategic topics, giving a broad outline of the actions needed to achieve a particular goal, plus the installation and configuration choices that may be available.

Oracle E-Business Suite CRM System Administrator's Guide

This manual describes how to implement the CRM Technology Foundation (JTT) and use its System Administrator Console.

Oracle E-Business Suite Developer's Guide

This guide contains the coding standards followed by the Oracle E-Business Suite development staff. It describes the Oracle Application Object Library components needed to implement the Oracle E-Business Suite user interface described in the *Oracle E-Business Suite User Interface Standards for Forms-Based Products*. It also provides information to help you build your custom Oracle Forms Developer forms so that they integrate with Oracle E-Business Suite. In addition, this guide has information for customizations in features such as concurrent programs, flexfields, messages, and logging.

Oracle E-Business Suite Installation Guide: Using Rapid Install

This book is intended for use by anyone who is responsible for installing or upgrading Oracle E-Business Suite. It provides instructions for running Rapid Install either to carry out a fresh installation of Oracle E-Business Suite Release 12, or as part of an upgrade from Release 11i to Release 12. The book also describes the steps needed to install the technology stack components only, for the special situations where this is applicable.

Oracle E-Business Suite System Administrator's Guide Documentation Set

This documentation set provides planning and reference information for the Oracle E-Business Suite System Administrator. *Oracle E-Business Suite System Administrator's*

Guide - Configuration contains information on system configuration steps, including defining concurrent programs and managers, enabling Oracle Applications Manager features, and setting up printers and online help. *Oracle E-Business Suite System Administrator's Guide - Maintenance* provides information for frequent tasks such as monitoring your system with Oracle Applications Manager, administering Oracle E-Business Suite Secure Enterprise Search, managing concurrent managers and reports, using diagnostic utilities including logging, managing profile options, and using alerts. *Oracle E-Business Suite System Administrator's Guide - Security* describes User Management, data security, function security, auditing, and security configurations.

Oracle E-Business Suite User Interface Standards for Forms-Based Products

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

Other Implementation Documentation

Oracle Applications Multiple Organizations Implementation Guide

This guide describes how to set up multiple organizations and the relationships among them in a single installation of an Oracle E-Business Suite product such that transactions flow smoothly through and among organizations that can be ledgers, business groups, legal entities, operating units, or inventory organizations. You can use this guide to assign operating units to a security profile and assign this profile to responsibilities such that a user can access data for multiple operation units from a single responsibility. In addition, this guide describes how to set up reporting to generate reports at different levels and for different contexts. Reporting levels can be ledger or operating unit while reporting context is a named entity in the selected reporting level.

Oracle Approvals Management Implementation Guide

This guide describes transaction attributes, conditions, actions, and approver groups that you can use to define approval rules for your business. These rules govern the process for approving transactions in an integrated Oracle application. You can define approvals by job, supervisor hierarchy, positions, or by lists of individuals created either at the time you set up the approval rule or generated dynamically when the rule is invoked. You can learn how to link different approval methods together and how to run approval processes in parallel to shorten transaction approval process time.

Oracle Diagnostics Framework User's Guide

This guide contains information on implementing, administering, and developing diagnostics tests for Oracle E-Business Suite using the Oracle Diagnostics Framework.

Oracle E-Business Suite Flexfields Guide

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

Oracle E-Business Suite Integrated SOA Gateway Implementation Guide

This guide explains the details of how integration repository administrators can manage and administer the entire service enablement process based on the service-oriented architecture (SOA) for both native packaged public integration interfaces and composite services - BPEL type. It also describes how to invoke Web services from Oracle E-Business Suite by working with Oracle Workflow Business Event System, manage Web service security, and monitor SOAP messages.

Oracle E-Business Suite Integrated SOA Gateway User's Guide

This guide describes how users can browse and view the integration interface definitions and services that reside in Oracle Integration Repository.

Oracle e-Commerce Gateway Implementation Manual

This guide describes implementation details, highlighting additional setup steps needed for trading partners, code conversion, and Oracle E-Business Suite. It also provides architecture guidelines for transaction interface files, troubleshooting information, and a description of how to customize EDI transactions.

Oracle e-Commerce Gateway User's Guide

This guide describes the functionality of Oracle e-Commerce Gateway and the necessary setup steps in order for Oracle E-Business Suite to conduct business with trading partners through Electronic Data Interchange (EDI). It also describes how to run extract programs for outbound transactions, import programs for inbound transactions, and the relevant reports.

Oracle iSetup User's Guide

This guide describes how to use Oracle iSetup to migrate data between different instances of the Oracle E-Business Suite and generate reports. It also includes configuration information, instance mapping, and seeded templates used for data migration.

Oracle Product Lifecycle Management Implementation Guide

This guide describes how you can define hierarchies of items using structure types, catalogs, and catalog categories, and define change categories and configure them for revised items or request lines. Oracle Product Lifecycle Management provides several

predefined catalogs such as the Product Catalog, Asset Catalog, and the Service Catalog and predefined change categories such as change orders and ideas. Use this guide to learn how to define additional catalogs for browsing and reporting purposes and new change categories specific to your business needs. You can then learn how to set up users and responsibilities that provide or restrict access to these catalogs, catalog items, and change management objects.

Oracle Product Lifecycle Management User Guide

This guide describes how to create and manage catalogs, create and maintain product attributes and attribute values, and manage item statuses and lifecycle phases. You can learn how to create change categories, create task templates for change orders, and create change management reports. In addition, you can use this guide to create roles, map roles to privileges, and maintain these roles.

Oracle Web Applications Desktop Integrator Implementation and Administration Guide

Oracle Web Applications Desktop Integrator brings Oracle E-Business Suite functionality to a spreadsheet, where familiar data entry and modeling techniques can be used to complete Oracle E-Business Suite tasks. You can create formatted spreadsheets on your desktop that allow you to download, view, edit, and create Oracle E-Business Suite data, which you can then upload. This guide describes how to implement Oracle Web Applications Desktop Integrator and how to define mappings, layouts, style sheets, and other setup options.

Oracle Workflow Administrator's Guide

This guide explains how to complete the setup steps necessary for any Oracle E-Business Suite product that includes workflow-enabled processes. It also describes how to manage workflow processes and business events using Oracle Applications Manager, how to monitor the progress of runtime workflow processes, and how to administer notifications sent to workflow users.

Oracle Workflow Developer's Guide

This guide explains how to define new workflow business processes and customize existing workflow processes embedded in Oracle E-Business Suite. It also describes how to define and customize business events and event subscriptions.

Oracle Workflow User's Guide

This guide describes how Oracle E-Business Suite users can view and respond to workflow notifications and monitor the progress of their workflow processes.

Oracle XML Gateway User's Guide

This guide describes Oracle XML Gateway functionality and each component of the Oracle XML Gateway architecture, including Message Designer, Oracle XML Gateway

Setup, Execution Engine, Message Queues, and Oracle Transport Agent. It also explains how to use Collaboration History that records all business transactions and messages exchanged with trading partners.

The integrations with Oracle Workflow Business Event System, and the Business-to-Business transactions are also addressed in this guide.

Oracle XML Publisher Administration and Developer's Guide

Oracle XML Publisher is a template-based reporting solution that merges XML data with templates in RTF or PDF format to produce outputs to meet a variety of business needs. Outputs include: PDF, HTML, Excel, RTF, and eText (for EDI and EFT transactions). Oracle XML Publisher can be used to generate reports based on existing Oracle E-Business Suite report data, or you can use Oracle XML Publisher's data extraction engine to build your own queries. Oracle XML Publisher also provides a robust set of APIs to manage delivery of your reports via e-mail, fax, secure FTP, printer, WebDav, and more. This guide describes how to set up and administer Oracle XML Publisher as well as how to use the Application Programming Interface to build custom solutions. This guide is available through the Oracle E-Business Suite online help.

Oracle XML Publisher Report Designer's Guide

Oracle XML Publisher is a template-based reporting solution that merges XML data with templates in RTF or PDF format to produce a variety of outputs to meet a variety of business needs. Using Microsoft Word or Adobe Acrobat as the design tool, you can create pixel-perfect reports from the Oracle E-Business Suite. Use this guide to design your report layouts. This guide is available through the Oracle E-Business Suite online help.

Training and Support

Training

Oracle offers a complete set of training courses to help you master your product and reach full productivity quickly. These courses are organized into functional learning paths, so you take only those courses appropriate to your job or area of responsibility.

You have a choice of educational environments. You can attend courses offered by Oracle University at any of our many Education Centers, you can arrange for our trainers to teach at your facility, or you can use Oracle Learning Network (OLN), Oracle University's online education utility. In addition, Oracle training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may want to use your organization structure, terminology, and data as examples in a customized training session delivered at your own facility.

Support

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

Do Not Use Database Tools to Modify Oracle E-Business Suite Data

Oracle **STRONGLY RECOMMENDS** that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle E-Business Suite data unless otherwise instructed.

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

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

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

Introduction

This chapter covers the following topics:

- E-Business Suite Applications
- Oracle Proposals Overview

E-Business Suite Applications

Customers can share data from front-end applications (CRM) to back-end applications (ERP) in the Oracle E-Business Suite. The applications leverage Oracle's Common Application Architecture, page 1-3.

The Customer Relationship Management (CRM), page 1-2 applications encompass:

- Marketing suite
- Sales suite
- Contracts suite
- Service suite
- eCommerce suite

The Enterprise Resource Planning (ERP), page 1-3 applications include:

- Oracle Order Management
- Oracle Supply Chain Planning
- Oracle Manufacturing
- Oracle Financials
- Oracle Human Resources Management System

Customer Relationship Management (CRM)

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

- The **Marketing** suite provides campaign planning and execution, budget management, list creation, reporting, and analysis tools. Marketing professionals use the Oracle Marketing applications to drive quality leads to sales, to expand reach, and to maximize marketing effectiveness by using a comprehensive set of marketing automation, analysis, and multi-channel execution capabilities. The Marketing suite offers seamless integration with sales, service, and operations.
- The **Sales** suite provides integrated tools for all players in the sales process, including field salespeople, telesales agents, distributors and resellers, sales executives, and Internet customers.

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

- The **Contracts** suite enables authoring, executing, and managing contracts, warranties and extended warranties, providing visibility to contract entitlements and the ability to proactively act upon contractual commitments. Whether a buyer or a seller, issuing contracts or receiving them, the Contracts suite automates the full contract life cycle.
- The **Service** suite manages service activities with the goals of profitability, employee productivity, and enhanced customer satisfaction by comprehensively addressing service and support activities from initial contact with the customer through issue resolution. Automating service efforts can potentially transform an area that has historically proven to be a cost center into a revenue generator.

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

- The **eCommerce** suite of products aid in establishing profitable long-term relationships with customers through Internet availability, one-to-one marketing and personalized shopping experiences, as well as proactive support and

self-service capabilities. Oracle eCommerce synchronizes all customer interactions and transactions by integrating web-based channels with traditional channels.

Enterprise Resource Planning (ERP)

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

- **Oracle Order Management** applications feature advanced configurator functionality, global available to promise, flexible pricing support, efficient delivery, high volume transactions, and the flexibility to adapt to changing business conditions.
- **Oracle Supply Chain Planning** applications provide the tools required to optimize flow of material, cash, and information across the extended supply chain.
- **Oracle Manufacturing** applications support all styles of manufacturing - engineer-to-order, discrete, process, flow, lot based, and project based manufacturing.
- **Oracle Financials** provide solutions for strategic planning, accounting, treasury, project management, and travel management.
- **Oracle Human Resources Management System** is a comprehensive solution for managing a company's human resources, allowing organizations to attract, retain and develop critical skills and knowledge on a global basis.

Common Application Architecture

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

Oracle Proposals Overview

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

- Shorten the sales cycle by reducing from days to hours the time needed to generate a proposal
- Project a consistent and high quality professional image

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

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

Central template administration guarantees standard and professional corporate proposals.

Oracle Proposals also allows proposal administration through:

- Template management
- Dynamic field administration

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

Oracle Proposals Features

Oracle Proposals includes the following features:

Proposal Creation

Users can create a proposal from a quote, opportunity, lead or for a customer. Users can also create a standalone proposal in which the user provides the customer and/or contact name. Users select a master proposal template from a list of possible templates and can specify the proposal name, description, customer, and due date. From the opportunity, lead, quote, and customer, the customer name is automatically carried over with a contact, if one is available.

Quoting Integration

Users can create a proposal based on a quote in Oracle Quoting. When a proposal is created from a quote, relevant quote information is automatically pulled into the proposal.

Leads Integration

Oracle Proposals is integrated with Leads in Oracle Sales. This integration allows a Oracle Proposals user in the Self-Service mode to create a proposal from a lead in Oracle Sales, where information from the lead is pulled into the proposal during the proposal creation process. If the lead is associated with a campaign activity, the proposal template associated to the campaign activity is automatically used.

Content Management Integration

Oracle Proposals is integrated with Oracle Content Manager (OCM). This integration allows Oracle Proposals administrators and users to store and reuse content when

constructing their templates and proposals, respectively. Users can access files stored in either the OCM Folders or the OCM Library and add it to their proposal. Users can also store files from the desktop to a proposal in an OCM folder. Administrators can store and reuse files in OCM. OCM integration is determined by the setting of a profile option that allows flexibility in the level of integration.

Campaign Activity Integration

Oracle Proposals is also integrated with campaign activity in Oracle Marketing. This integration allows association of a proposal template to a campaign activity in Oracle Marketing.

Opportunity Integration

Oracle Proposals is integrated with Opportunity in Oracle Telesales and Oracle Sales. This integration allows Oracle Proposals users to create a proposal from an opportunity in Oracle Telesales or Oracle Sales, where information from the opportunity is pulled into the proposal during the proposal creation process. If the opportunity is related to a campaign activity, the proposal template associated to the campaign activity is automatically used.

Customer Integration

Oracle Proposals is integrated with Customer in Oracle Telesales and Oracle Sales. This integration allows Oracle Proposals users to create a proposal from a customer in Oracle Telesales, where information from the customer is pulled into the proposal during the proposal creation process. If the customer is related to a campaign activity, the proposal template associated to the campaign activity is automatically used. Oracle Proposals users can also view proposals from **Customer** Business Activities in Oracle Sales.

Guided Proposal Content Building

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

Administrators have the ability to specify if a proposal file created for a template can have files added to it. Users can then add external files from their desktop, the Oracle Content Manager Library or Oracle Content Manager Folders.

Proposals Page

The Proposals Page lists existing proposals and enables users to initiate proposal creation. Proposals are displayed across languages.

Proposal Update Page

The Proposal Update page enables users to update an existing proposal and displays tabs that contain overall proposal information, generated documents, correspondence

related to the proposal, notes and tasks, and sales team members who can work on the proposal.

Proposal Views

Oracle Proposals enables you to save searches for future use. These saved searches, called views, control the display of data in the Proposals page. You can use the views provided with Oracle Proposals or you can create your own views. You can display the results of searching with a view by selecting a view name from the view menu and clicking Go. To create a view, click Personalize to access the Personalize Views page. On this page you can create, edit, or duplicate views by selecting the appropriate button.

Proposal Searches

Users can perform searches on criteria such as proposal name, customer data, and creation or due date and can save searches. Oracle Proposals is integrated with Oracle Trading Community Architecture (TCA). The Data Quality Management (DQM) functionality in TCA allows for expanded customer and contact search capabilities and minimizes the creation of duplicate parties. When DQM is enabled, the fields that you see in the Simple and Advanced Search: Person or Organization pages, are dynamically generated based on system settings.

Proposal Document Generation

After users have built the proposal content, they can generate a proposal document in RTF or PDF format. This document is the physical file that is shared with the customer. Users can regenerate documents as often as needed. Each regenerated document exists as a new version and is stored in the database.

Supporting Documents for Proposals

Users can add supporting documents to their proposals. These documents are optional, and can be of any file format. These optional documents can be added from the desktop, from the Oracle Content Manager library or folder, or from suggested content based on the proposal components.

E-Mail Delivery

Using Oracle Proposals, users can send proposals by e-mail, including supporting documents, to customers and other recipients. The user selects the appropriate proposal document version, specifies customer contacts, and then sends them to the contacts and other recipients. A record of the e-mail delivery is also recorded under the customer name in Interaction History.

Proposal Templates

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

Administrators define template categories, create templates, create components, and

determine component order. The template category and name help users select the most appropriate template for each proposal.

When an administrator uploads an updated proposal template component, users are notified that the component has been updated when they access the proposal using the updated component.

Proposal Components for Standardized Content

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

The documents are RTF (Rich Text Format) files that store content such as standard text, graphs, tables, or dynamic fields. Users can create these RTF files using Microsoft Word, use them in proposal components, and store them in Oracle Content Manager for reuse.

Also, Oracle Proposals enables the user to add suggested content. The suggested content choices are based on the components associated with the proposal, or the associated quote, opportunity, or lead. For example, if a proposal contains a component pertaining to a server, suggested content might be a data sheet for that server.

Dynamic Fields

Administrators can include dynamic fields in the component documents to reference information from various sources. For example, a cover letter, where the customer name and address changes, can have dynamic fields inserted into the locations where the customer name and address would be. The user can then personalize the cover letter for a particular customer.

Specifically, values for dynamic fields can come from the user (such as proposal title), database objects (such as items and pricing), or custom Java programs, retrieving data from various objects and object sources, including images. Images can be of the types JPG, JPE, JPEG, JFIF, or PNG. Images can be uploaded from the desktop, OCM folder, or OCM library.

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

Sales Team Collaboration on Proposals

A large or complex opportunity might require several team members to work on a proposal for that opportunity. The Sales team tab on the Proposal Update page enables users to manage this team effort, containing a table listing the sales representatives and sales managers who are collaborating on a proposal. Sales team members can have full or read only access to the proposal.

Interface Navigation Features

- **Link trail:** As you navigate through Oracle Proposals, the links to the pages you have visited are shown at the top of your current page. For example: Proposals > Proposal Update. Use these links to navigate back through the product.
- **Partial page refresh:** This feature enables you to see the changed portion of a page without waiting for the entire page to refresh. For example, if you are viewing a table of proposals, you can select a radio button next to a proposal and details about that proposal are displayed below the table. When you select a different proposal, the information shown below the table is refreshed with details on the newly-selected proposal.
- **Sortable table columns:** Many table columns are sortable in Oracle Proposals. Clicking the column heading sorts the data in ascending or descending order.
- **Tabs:** Access the various features from the tabs in the interface.
- **< Previous and Next >:** Links that enable you to view the next available group of items in a table, or to navigate back to the previously listed group of items.
- **Show/Hide:** Click Show to expand a region and display further information. Click Hide to compress the information.
- **Back button:** Use your browser back button for navigation to a previous page.
- **Asterisks (*):** Fields with asterisks denote required information.

Before You Begin

This chapter covers the following topics:

- Installation Verification
- Integration Points
- Oracle Proposals Conditional Dependencies
- Technology Stack

Installation Verification

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

References

Installing Oracle Applications

Integration Points

The following sections contain basic information on other Oracle applications that Oracle Proposals integrates with.

- **Resource Manager:** Resource Manager is a central repository for all resources used to import and view resources, define resources and roles, create teams and groups, and organize resources within those teams and groups. See the *Oracle Trading Community Architecture Administration Guide*.
- **Interaction History:** Interaction History is a collection of tables and business logic that records touch points between customers and resources for Oracle Applications. See the *Oracle Customer Interaction History Implementation Guide*.
- **Content Manager:** Content Manager is a central repository for all content that is

used for storing and reusing RTF files for Oracle Proposals. The repository can be accessed either through folders or library categories. See the *Oracle Content Manager Implementation and Administration Guide*.

- **Trading Community Architecture:** Trading Community Architecture (TCA) is a model for maintaining complex information about the parties and customers who belong to an entity's commercial community and is the single source of trading community information that all Oracle E-Business Suite Applications use. Proposals uses TCA customer and contact search pages, so that information pulled comes from TCA. In Proposals, the user can search for a customer, by Person or by Organization, and a contact from TCA. See the *Oracle Trading Community Architecture Administration Guide*.
- **Oracle Quoting:** If Oracle Proposals is implemented with Oracle Quoting, you can create proposals from a quote, add quotes to proposals, and use quote information as part of the proposal. Oracle Proposals retrieves the latest quote information when a proposal is generated.

For more information about Oracle Quoting, see the *Oracle Quoting User Guide*.

- **Oracle Marketing:** If Oracle Proposals is implemented with Oracle Marketing, you can associate proposal templates to campaign activities in Oracle Marketing. When these activities are executed and opportunities created, proposals created from these opportunities automatically pick up the associated templates

For more information about Oracle Marketing, see the *Oracle Marketing User Guide*.

- **Oracle TeleSales:** If Oracle Proposals is implemented with Oracle Telesales, you can create proposals from an opportunity or lead. When the proposal is created from the opportunity, the customer information is carried over to the proposal.

For more information about Oracle TeleSales, see the *Oracle Telesales User Guide*.

- **Oracle Sales:** If Oracle Proposals is implemented with Oracle Sales, you can create proposals from an opportunity or lead. You can also view proposals from a customer.

For more information about Oracle Sales, see the *Oracle Sales User Guide*.

Third Party Integrations

Oracle Proposals generates proposal documents in RTF (Rich Text Format) format viewable in any third party word processor. In integration with Oracle XML Publisher, Proposals generates proposals in the Portable Document Format (PDF) viewable from Adobe Reader. Integration with word processing and XML publishing programs is necessary to create and store standard component content, including dynamic fields and formatting style, and to view generated proposal documents.

A data compression application might be required to decompress generated proposal

documents.

Also, a standard PDF reader should be installed to enable you to preview documents in PDF format.

Oracle Proposals Conditional Dependencies

Oracle Proposals depends on features of the following products to provide robust and complete Proposals functions.

Oracle Quoting: Oracle Proposals requires the setup and installation of Oracle Quoting if your users will be adding quotes to a proposal, creating a proposal from a quote, or using the quote dynamic field substitution functionality.

Oracle Contracts: Oracle Contracts is a conditional dependency for Oracle Proposals if being pulled in as part of a quote through Oracle Quoting. A profile option in Oracle Quoting determines whether Oracle Contracts will be used, so Oracle Contracts is a dependency only if the Oracle Proposals user is going to use Oracle Quoting with Oracle Contracts enabled. If Oracle Contracts is enabled, Oracle Proposals does not support the following in Oracle Contracts:

- Table tokens in Contracts templates are not resolved by Oracle Proposals. Users must ensure that table tokens are not used in Oracle Contracts if they want to bring in article text into a Proposal.
- Article text authored using **Rich Text** mode in Oracle Contracts: Oracle Contracts enables users to specify formatting within their Articles authoring page. Oracle Proposals will not render this formatting information in the generated proposal. Users should therefore make sure that they author their terms using **Plain Text** mode while authoring articles.

Oracle Marketing: Oracle Proposals requires the setup and installation of Oracle Marketing if your users will be associating proposal templates to campaign activities.

Oracle Telesales: Oracle Proposals requires the setup and installation of Oracle Telesales if your users will be creating proposals from **Opportunity** or from **Customer**.

Oracle Sales: Oracle Proposals requires the setup and installation of Oracle Sales if your users will be creating proposals from **Leads** or from **Opportunity**.

Oracle Trading Community Architecture: Oracle Proposals leverages Trading Community Architecture's Data Quality Management (DQM) functionality in the customer search components. DQM enables the user to set up advanced match rules as well as define the search criteria and results for the search screens.

Oracle Proposals uses the Trading Community Architecture's Data Quality Management (DQM) **Party Merge**. You can use **Party Merge** to identify and resolve duplicates that exist in the Trading Community registry.

References

- *Oracle Quoting Implementation Guide*
- *Oracle Sales Contracts Implementation and Administration Guide*
- *Oracle Marketing Implementation Guide*
- *Oracle TeleSales Implementation Guide*
- *Oracle Sales Implementation Guide*
- *Oracle Trading Community Architecture User Guide*
- *Oracle Territory Manager Implementation Guide*
- *Oracle XML Publisher Implementation Guide*

Technology Stack

Desktop Tier

Oracle Proposals supports certain features of the RTF 1.8 specification. These features are:

- Unicode (16 bit)
- Table styles
- List pictures
- Document properties

See the Microsoft Word 2003 Rich Text Format (RTF) Specification, version 1.8 for details.

Note: Oracle Proposals supports RTF files created using only Microsoft Word.

Implementation Tasks for Oracle Proposals

This chapter covers the following topics:

- Oracle Proposals Implementation Overview
- Implementation Task Sequence
- User Types Overview
- User Type Setup
- E-mail Setup
- Administration Tasks
- Verify the Implementation

Oracle Proposals Implementation Overview

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

Implementation Task Sequence

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

The following table describes the order and process of implementing Oracle Proposals.

Implementation Task Sequence

Step	Description	Performed Where	Performed By
1	Apply PRP Patch.	Environment	System Administrator

Step	Description	Performed Where	Performed By
2	Check dependencies.	Environment	System Administrator
3	Create users, or identify existing users and verify their responsibility. Assign administrators the Proposals Main Menu . Assign sales representative users the Proposal Homepage Function .	Forms	System Administrator
4	Assign appropriate menus to any new responsibility.	Forms	System Administrator
5	Verify administrators and sales representative users are resources in Resource Manager.	Forms	System Administrator
6	Set up profile options.	Forms	System Administrator

User Types Overview

There are two main types of Proposals users- administrators and users.

Users can also be set up using the Oracle System Administrator Console.

The system administrator assigns the **FND** menus for Oracle Proposals users.

Before initiating Oracle Forms settings, verify that Oracle Applications is up and running. Because some setup steps require running concurrent programs, you must ensure that the concurrent managers are running. Consult your Oracle Applications system administrator for additional information.

References

- *Oracle Applications System Administrator's Guide*
- *Oracle Trading Community Architecture Administration Guide*

- *Oracle Trading Community Architecture User Guide*
- *Oracle Applications Concepts*

Oracle Proposals Administrators

Administrators have access to both the Administration and User sections of Oracle Proposals. Log in to Self Service applications and choose the Proposals Administrator responsibility. Access the administration tasks from the Administration menu and the user tasks from the Proposals link.

From the Administration link, you can access, create, delete, and generate administrative data including:

- Templates
- Components
- Dynamic Fields
- Template Categories

From the Proposals link, administrators can:

- Create Proposals
- View Proposals
- Delete Proposals
- Modify Proposals
- Generate Proposals
- Email Proposals
- Search for Proposals

Administrators, like regular users, can only view and update those proposals for which they are on the sales team. There is no administrative access to all user's proposals.

Oracle Proposals Users

Oracle Proposals users have access to the Proposals page to perform basic user functions. User must be set up as a **Resource** in Resource Manager. They will **not** have access to administrative data. They can:

- Create Proposals

- View Proposals
- Delete Proposals
- Modify Proposals
- Generate Proposals
- Send Proposals by E-mail
- Search for Proposals

User Type Setup

To access Oracle Proposals, a user must be set up as a **FND User** and as a **Resource** in Resource Manager. When a user logs into Oracle Proposals, a check is made against the FND table. Oracle Proposals checks to see if the **FNDUser** is a **Resource** first. If the user is set up as a **Resource** in Resource Manager, then the user's information such as name, title, phone, fax, e-mail id and address is picked from there. Care must be taken to ensure that if the user is a resource, all user information is stored correctly in Resource Manager. If the user information is not available in either FND or Resource Manager, the user's information is blank.

Note: The **FND User** name must be assigned to the user name field in Resource Manager.

Creating a Resource

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

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

To synchronize any changes that have been made to employee information in Human Resources with Resource Manager, you must run the **Synchronize Employee** concurrent program from CRM administrator responsibility.

If you do not create a resource properly for the user, the user receives an error message when accessing proposals:

- **You do not have access to view or create proposals. Please contact your administrator to set up your user profile.**

For information on creating a resource, see the *Oracle Trading Community Architecture User Guide*.

Creating an FND User and Assigning Responsibilities, Menus and Functions

In Self-Service mode, there are two seeded responsibilities that can be assigned to the user giving the user access to Oracle Proposals:

- Oracle Proposals Administrator
- Oracle Proposals User

The system administrator can use an alternative method of assigning menus and functions to the Oracle Proposals user after the FND user has been created and a responsibility has been assigned:

- **Proposal Main Menu** (PRP_MAIN_MENU)
- **Proposal Homepage Function** (PRP_PR_PROPOSAL_HOME)

See the *Oracle Applications System Administrator's Guide* for details.

E-mail Setup

There are two profile options that must be set for e-mail capability in Oracle Proposals:

- **PRP: SMTP Server Name**
- **PRP: SMTP Server Port**

Oracle Proposals uses the e-mail address stored in Resource Manager for the contact. Therefore, the **Synchronize Employee** Concurrent Manager needs to be run any time there is an update to e-mail information in Human Resources or FND.

Note: If the **Synchronize Employee** Concurrent Manager is not run properly, the sales representative's e-mail address used to send the proposal by e-mail to the customer will not be correct.

Users should be given access to the e-mail SMTP server from the middle tier. Otherwise, users can receive an error when e-mailing proposals.

Related Topics

Oracle Proposals Profile Options, page A-2

Administration Tasks

Before users can create proposals, a user who is identified as the proposals administrator needs to set up the following:

- Template Categories
- Templates
- Components
- Dynamic Fields

See the *Proposals User Guide* for details on template administration.

Personalizing Business-to-Consumer Flows

There are three flows in which proposals can be created - Business-to-Business (B2B), Business-to-Consumer (B2C), and a combination of both. Out of the box, the B2B flow is enabled. Depending on your organization requirements, you could also enable the B2C flow by doing the following:

- In the Create Proposal and Update Proposal pages, hide the Contact Name field and the Select button using OA Personalization. In a B2C flow, there are no contacts.
- In the Proposal Views Page, hide the Contact column, the Contact Name field and the Select button in the detail area.
- Set the profile *HZ: Default Party Type* to *Person*.

Refer the *Oracle Sales Implementation Guide* for more details on this profile.

Verify the Implementation

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

- Creating users and assigning the appropriate menu or function.
- Verifying that the **FND User** name is populated and that the user is in Resource Manager as a **Resource**.
- Setting up the Oracle Proposals profile options.
- Creating and administering template categories, components, and templates.

You must also be able to complete all of the following tasks successfully, or Oracle Proposals has not been implemented properly.

- Create a proposal.
- View a proposal.

- Generate a proposal document.
- Delete a proposal.
- Send a proposal document by e-mail.

If you are able to perform these functions successfully, the implementation has been successful. See the *Oracle Proposals User Guide* for details on working with Proposals.

Oracle Proposals Integrations

This chapter covers the following topics:

- Integration with Oracle Content Manager
- Integration with Oracle Quoting: Quote
- Integration with Oracle Marketing: Campaign Activity
- Integration with Oracle Telesales: Opportunity or Customer
- Integration with Oracle Sales: Opportunity or Lead
- Integration with Oracle Trading Community Architecture
- Third Party Integration

Integration with Oracle Content Manager

Oracle Proposals supports integration with Oracle Content Manager (OCM). OCM is a central repository where users and administrators can maintain files in folders and in the library. Oracle Proposals users will be able to reuse existing files stored in the folders and library as well as store files from desktop into an OCM folder. OCM is not mandatory, however, it is needed to reuse and share files from a common repository.

Setting the PRP: Use Oracle Content Manager Profile

Setting the profile option, **PRP: Use Oracle Content Manager** allows the administrator to determine the level of integration with Oracle Content Manager. See Appendix A, page A-1 for details.

Setting the IBC: Use Access Control Profile

Oracle Content Manager (OCM) uses permissions at the folder and library levels. Permissions give users the ability to perform certain actions on a folder or a category in the library. The OCM profile, **IBC: Use Access Control**, determines whether permissions will be overridden or not. Oracle Proposals uses this profile option. See

Appendix A, page A-1 for details on profile options. Also, see the *Oracle Content Manager Implementation and Administration Guide*.

Setting Folder Permissions

If **IBC: Use Access Control** is set to **Yes**, then folder permissions apply.

To integrate Oracle Content Manager (OCM) with Oracle Proposals, appropriate permissions to OCM Folders must be given to the users and administrators by an OCM administrator. These permissions must be given during implementation.

For manageability, Oracle Proposals has seeded folders to enable setups of the folder integration. Oracle Proposals has seeded two different folders, one for the Oracle Proposals users and the other for the Oracle Proposals administrators. See Appendix B, "Permissions for Oracle Content Manager", page B-1 for details.

Seeded Proposal User Folder

- **Seeded Folder Name:** Users
- **Directory:** Root/Sales Application/Users

This folder has been seeded to enable Proposals users to create their own personal sub-folder. At the time of implementation, Proposal users should be given **Create Sub-folder** permission to this seeded folder. This enables users to create their own sub-folder. Proposals automatically gives the user the permissions to upload and view files in the new folder. Permissions from the seeded folder will not be inherited to the new folder.

Note: Oracle Content Manager allows permissions to be given at different levels, for example, user, responsibility, or group. Grant permissions to the Oracle Proposals users through the user's responsibility.

Seeded Proposal Administrator Folder

- **Seeded Folder Name:** Documents
- **Directory:** Root/Sales Application/Administrator/Documents

This folder has been seeded to enable Oracle Proposals administrators the ability to share, upload, and view all files used in creating components as well as enable administrators to create folders. Since administrators will share files and might have to translate Oracle Proposals files used in components in a multi-language implementation, all the Oracle Proposals administrators should be given the following permissions to this folder: **Create Sub-folder**, **Manage Item**, **Approve Item**, **Approve Translation**, **Translate Item**, and **Read Item**. For any new folders, the permissions are

copied from the Documents folder for all users.

Setting Library Permissions

Users and administrators must be given **View Content** permission to categories so that they can select and add files to the proposals and components. See Appendix B, page B-1 for details.

Consuming Oracle Content Manager Content Items in Oracle Proposals

Content items must have the following attributes to be viewed and used within Oracle Proposals' search/browse screens for the Library and Folders. If the content item does not have the following attributes, it is not delivered to the user.

- Has an extension of ".rtf"
- Is a valid .rtf file
- Is live
- Is approved
- Is in the user's session language

Files stored in Oracle Content Manager through the Oracle Proposals user interface are automatically stored with these attributes and are of the **File** content type.

Setting the IBC: Default Home Folder Profile

Setting this profile option allows the user to choose the default folder that users can store files in and browse in. See Appendix A , page A-1 for details.

Integration with Oracle Quoting: Quote

Oracle Proposals supports integration with Oracle Quoting. Quotes can be used in Proposals provided Oracle Quoting is installed.

Setting up Proposal Creation from Quotes

Oracle Quoting integrates with Oracle Proposals to create proposals from quotes and to add existing quotes to proposals. The objective of this integration is to extract quote information and pull it into the proposal. When a proposal is being generated, Oracle Proposals pulls in the latest quote information from the relevant quote in Oracle Quoting.

Note: Proposals that are generated before a quote is updated must be

regenerated to reflect the quote's current content.

To integrate Oracle Quoting with Oracle Proposals, you must have Oracle Quoting installed. See the *Oracle Quoting Implementation Guide* for details.

Integration with Oracle Marketing: Campaign Activity

Oracle Proposals supports integration with campaign activities in Oracle Marketing. Proposal templates can be associated to campaign activities only if Oracle Marketing is installed. See the *Oracle Marketing Implementation Guide* for details.

Integration with Oracle Telesales: Opportunity or Customer

Oracle Proposals supports integration with Oracle Telesales. Users are able to create proposals from an opportunity or customer from this product. See the *Oracle TeleSales Implementation Guide* for details.

Integration with Oracle Sales: Opportunity or Lead

Oracle Proposals supports integration with Oracle Sales. Users can create proposals from **Opportunity** and **Leads** and view all proposals for a customer provided that Oracle Sales is installed. See the *Oracle Sales Implementation Guide* for details.

Integration with Oracle Trading Community Architecture

Oracle Trading Community Architecture (TCA) integrates with Oracle Proposals for providing a central customer data repository. Data Quality Management (DQM) is a functionality in TCA that allows the Oracle Proposals user to select a customer and contact for the proposal from TCA.

Setting up Data Quality Management (DQM) Customer and Contact Search

To use Data Quality Management (DQM) in Oracle Proposals, you must have Oracle Trading Community Architecture installed. Setting up DQM in Oracle Proposals is not mandatory. If it is not set up, the Oracle Proposals search page consists of a simple LOV. If DQM is set up, the customer and contact search pages consist of simple or advanced search parameters that leverage the DQM functionality.

The **Party Merge** and **Account Merge** functionality, which are part of the DQM tools provided by TCA, can be used to identify and resolve duplicates that exist in the Trading Community registry.

See the *Oracle Trading Community Architecture Administration User Guide*.

Third Party Integration

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

- Create and store standard component content, including dynamic fields as well as formatting style.
- View generated proposal document.

Also necessary is a data compression application to unzip compressed content, and a PDF reader.

Oracle Proposals Profile Options

This appendix covers the following topics:

- Before You Begin
- Setting Profile Options
- Oracle Proposals Profile Options
- Oracle Content Manager Profile Options
- Oracle Trading Community Architecture Profile Options

Before You Begin

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

Setting Profile Options

Use the following procedure to set any profile option.

Navigation

Oracle Forms > Profile > System > Find Profile System Values window

Notes

Level: Check the level(s) at which you want to set the profile option: **Site**, **Application**, **Responsibility**, and/or **User**.

Profile: Enter the profile name or a wildcard search criterion such as `PRP%`, to find the profile option you are looking for.

Oracle Proposals Profile Options

When implementing Oracle Proposals, you must set the profile options listed in Table A-1.

Table A-1 Oracle Proposals Profile Options

Profile Name	Category	Description	Level	Default
PRP: Access to Unpublished Templates	Security	Determines whether users with proposal administrator responsibility have access to create proposals using unpublished templates.	SARU	No
PRP: Email Proposals to External Parties	Setup	<p>Determines whether users can e-mail proposals directly to someone outside the customer's contact list.</p> <p>If set to Yes, then users can e-mail proposals to recipients by directly entering valid e-mail addresses in the "Additional Cc" or "Bcc" fields, as well as selecting recipients from a pre-defined list of customer contacts.</p>	SARU	No
PRP: Enable Real Time Proposal Assignment	Setup	If set to Yes, then resources are assigned as soon as a transaction is created or updated and the batch Territory Assignment Program (TAP) concurrent program has run. See the <i>Oracle TeleSales Implementation Guide</i> for details on TAP.	S	No

Profile Name	Category	Description	Level	Default
PRP: Manager Update Access	Security	<p>Determines the level of access a manager has to the subordinate's proposals. If set to View Data, the manager can only view the subordinate's proposals. If set to Update Data, the manager can update the subordinate's proposals. If set to Inherit Data, the manager inherits the subordinate's access. If the subordinate has view-only access, the manager inherits the same. If the subordinate has update access, the manager can update proposals of the subordinate. If the manager has multiple subordinates, the manager inherits the highest level of access.</p> <p>Valid values are View Data, Update Data, and Inherit Data.</p>	SARU	No
PRP: Max File Size in KB for Template Online Preview	Setup	<p>Determines the maximum size of the combined file for which preview is enabled. A document that exceeds this value cannot be previewed, and the user receives an error message.</p> <p>If the profile option value is set to Null, preview is always enabled.</p>	S	Null
PRP: Maximum File Size For Online Generation	Setup	<p>Determines maximum file size for proposals that are generated online. A document that exceeds this value is generated offline, and the Generate Proposal Concurrent Manager starts automatically. The value entered must be numeric.</p> <p>If the profile option value is set to Null, generation is performed online.</p>	S	Null

Profile Name	Category	Description	Level	Default
PRP: Proposal Access Privilege	Security	Determines user access to all proposals; overrides Sales Team access, even if set to Full. Valid values are Sales Team and Full.	SARU	Sales Team
PRP: SMTP Server Name	Setup	Provides the SMTP server name to be used for sending proposals by e-mail. Users should be given access to the SMTP server from the middle tier. Otherwise, users might receive errors when attempting to send proposals by e-mail.	S	N/A
PRP: SMTP Server Port	Setup	Provides the port number of the SMTP server to be used when connecting to the SMTP server. If no value is provided, the e-mail is sent using the default port (port number 25) of the SMTP server.	S	N/A
PRP: Default Number of Days for Proposal Due Date	Setup	Sets the default due date in all new proposals during the proposal creation process. The due date is equal to the current date plus the set value in this profile in terms of days.	ARU	10

Profile Name	Category	Description	Level	Default
PRP: Use Oracle Content Manager	Setup	<p>Enables the administrator to determine the level of Oracle Content Manager integration.</p> <p>Valid values are Mandatory, Optional, and No.</p> <p>If set to Mandatory, users can select files from the Oracle Content Manager Library or Folders. When adding files from a desktop, users must store the files in an Oracle Content Manager Folder.</p> <p>If set to Optional, users can store files added from the desktop in an Oracle Content Manager Folder. Users can select files from the Oracle Content Manager Library or Folders and add them to a proposal.</p> <p>If set to No, users cannot add or store files from Oracle Content Manager.</p>	SARU	No

Oracle Content Manager Profile Options

Specific Oracle Content Manager profile options must be set during Oracle Proposals implementation.

Table A-2 Oracle Content Manager Profile Options

Profile Name	Category	Description	Level	Default
IBC: Default Home Folder	Setup	Determines which folder in Oracle Content Manager is used as the default folder for users to store files. For the proposals administrator, the default folder is the seeded Documents folder.	U	N/A
IBC: Use Access Control	Security	To remain consistent with Oracle Content Manager's security, Oracle Proposals uses this profile option. If this profile is set to Yes, Oracle Content Manager takes into account the permissions set at the folder and category levels and Proposals users will need the appropriate permissions to update, view, or upload files in the Oracle Content Manager folders and library. If the profile is set to No, Oracle Content Manager does not look at the permissions and gives full access to the folders and categories. Proposals users will have the ability to access any folder or/category and will be able to upload, view, or update to any folder. See Appendix B, Permissions for Oracle Content Manager, page B-1, for details.		No

Oracle Trading Community Architecture Profile Options

The Oracle Trading Community Architecture (TCA) profile options HZ: Default Customer Type and HZ: Enable DQM Party Search must be set during Oracle Proposals implementation. See the *Oracle Sales Implementation Guide* for details on these profile options.

Permissions for Oracle Content Manager

This appendix covers the following topics:

- Overview
- Seeded Folders
- Create Folder
- Add File from Desktop flow
- Uploading an Associated Version Flow
- Browse and Search Folders and Library Categories

Overview

This section describes the permissions that are needed or recommended for the Oracle Content Manager (OCM) Folders and OCM Library categories. These permissions are only needed if the **IBC: Use Access Control** profile option is set to **Yes**.

Seeded Folders

Following are the permissions given to the administrator or user that is creating the folder. Folders will only be created under the seeded folders. Permissions will be inherited from the seeded folder in the administration flow only. In the user flow, the permissions will not be inherited.

Seeded Folders

Folder Directory	Seeded for	Recommended Access (granted by Oracle Content Manager Administrator)
Root/Sales Application/Users	Enable users to create folders in the desktop flow	Create Sub-Folder
Root/Sales Application/Administrator/D ocuments	Enable administrators to upload and share files with other administrators	Create Sub-Folder Manage Item Approve Item Approve Translation Translate Item Read Item

Create Folder

Following are the permissions given to the administrator or user that is creating the folder. Folders will only be created under the seeded folders. Permissions will be inherited from the seeded folder in the administration flow only. In the user flow, the permissions will not be inherited.

Permissions Given for Newly Created Folders

Flow	Permissions Given to a Newly Created Folder	Directory that Folders will be Created Under
User	Manage Folder Manage Item Translate Item Read Item Create Sub-Folder Approve Item Approve Translation	Root/Sales Application/Users

Flow	Permissions Given to a Newly Created Folder	Directory that Folders will be Created Under
Administrator	Manage Folder	Root/Sales Application/Administrator/Documents
	Manage Item	
	Translate Item	
	Read Item	
	Create Sub-Folder	
	Approve Item	
	Approve Translation	

Add File from Desktop flow

The following permissions are needed to store files in an Oracle Content Manager folder.

Permissions for Storing Files in an Oracle Content Manager Folder

Flow	Permissions Needed	Which Folders?	Default Folder
User	Manage Item	Any folder with these permissions	Folder specified in the IBC: Default Home Folder profile option.
	Approve Item		
	Read Item		
Administrator	Manage Item	Any folder with these permissions	Root/Proposals/Administrators/Documents
	Approve Item		
	Read Item		

Uploading an Associated Version Flow

If an administrator is uploading a non-base language version of a file, the administrator will need the following permissions:

Permissions for Uploading an Associated Version

Flow	Permissions Needed	Which Folders?
Administrator	Manage Item Approve Translation Read Item Approve Item Translate Item	Any folder with these permissions.

Note: If the administrator is uploading the base language in the Associate Version flow, the permissions will be the same as the **Add File from Desktop** flow.

Browse and Search Folders and Library Categories

Users/administrators must have the following permissions to browse or search the folders or categories:

Permissions for Browsing or Searching Folders or Categories

Folders or Categories	Permissions Needed	Which Folders?
Folders	Read Item	Any folder with these permissions.
Categories	View Content	Any category with these permissions.

Seeded Views

Proposals Seeded Views

Views are saved sets of search criteria. Users can use the seeded view provided with Oracle Proposals, or can create their own views.

Note: A saved view created in the Proposals page is not visible/accessible in the Proposals bin of the Sales Dashboard page and in the Proposals page when navigated from the Proposals shortcut on the Sales Dashboard page. Saved Views work at the page level.

Table C-1 describes the seeded view for Oracle Proposals.

Table C-1 Oracle Proposals Seeded View

View	Description	Columns Displayed	Default Seeded View
My Proposals	Displays proposals where the user is in the sales team of the proposal. Proposals are sorted by age (descending) and five rows are displayed.	<ul style="list-style-type: none">• Proposal name (links to proposal update page)• Customer name (links to customer details page)• Contact name (contact for the customer; links to contact details page)• Due Date (due date for the proposal)• Status (Draft or Final status of the proposal as specified)	Yes

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