

1 Sales Quote Demo

Welcome! This Sales Quote Demo is designed to help you understand how Oracle BPM Suite 11g can be used to design, simulate, implement, deploy, manage and monitor your business processes. As you progress through the demo, you will experience how Oracle BPM Suite facilitates business-IT collaboration throughout the process life cycle.

1.1 Understanding the Sales Quote Demo process	2
1.1.1 Opening the BPM Project for Sales Quote Process	3
1.1.2 Overview of Sales Quote Demo Project.....	3
1.1.3 Understanding Organization.....	6
1.1.4 Business Catalog.....	7
1.1.5 Business Data.....	8
1.1.6 Business Objects	8
1.1.7 Data Objects	9
1.1.8 Understanding the Approve Quote Interactive Step	10
1.1.9 Understanding the Determine Approval Rules step.....	13
1.1.10 User Interfaces for the Sales Quote Process.....	15
1.1.11 Loops in the Business Process.....	16
1.1.12 Understanding Save Quote Service Task	16
1.1.13 Understanding Data Associations	17
1.1.14 Understanding Business Indicators.....	18
1.2 Running the Sales Quote Process.....	19
1.2.1 Workspace Overview	19
1.2.2 Logging in to Workspace.....	19
1.2.3 Triggering the Sales Quote Process	20
1.2.4 Completing the Sales Quote Process instance	20

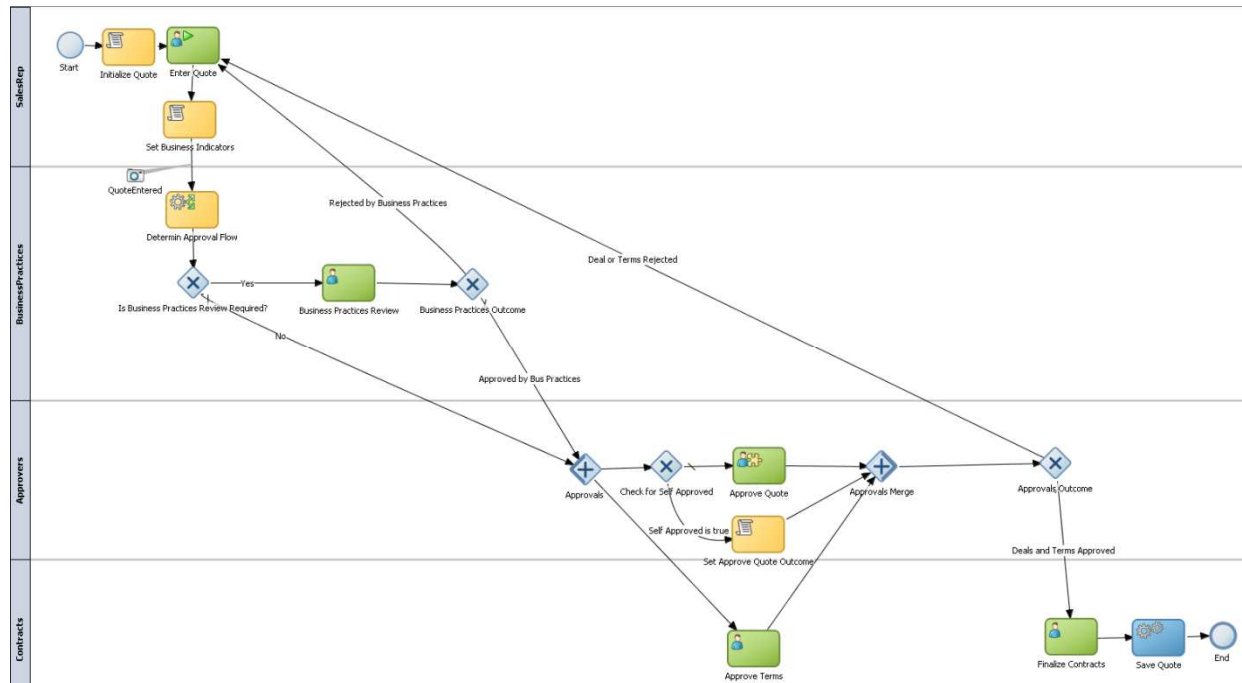
1.1 Understanding the Sales Quote Demo process

BPM Studio provides business user friendly process modeling and simulation. Using BPM Studio, a business analyst or process designer can model a business process including activities in the process, transitions between each activity, and roles associated with each activity. BPM Studio also allows the business analyst to define business rules in the context of business processes.

The business process implements a solution for Sales Representatives to submit Sales Quotes and manage all the approvals within a particular Sales organization. A quick recap on the business process definition and its flow is detailed below.

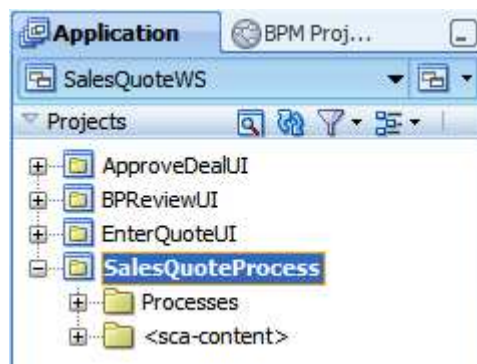
- The Business Process is triggered by a Sales Representative creating a Task to Enter the Quote details in the “**Enter Quote**” interactive step.
- The next step is to determine the list of approvers for the Quote using business rules and also to determine whether additional review by Business Practices is required. This is accomplished through the “**Determine Approval Rules**” step.
- After the rules have been evaluated, the next step is to check whether “**Business Practice Review**” is required and if “yes” go through the “**Business Practices Review**” step. This step will be carried out by the individuals assigned to the “**Business Practices**” role.
- The **Business Practices Review** can either **APPROVE** or **REJECT** the **Quote**. If **APPROVE**, it proceeds forward to the Approvals Parallel step. If **REJECT**, it goes back to **Enter Quote** step. In addition, the **Business Practices Role** can add more approvers or assignees to the **Approve Quote** step.
- Once the **Quote** hits the **Approvals** step, it needs to get approved in a parallel and concurrent fashion for the deal structure and terms. This is carried out by **Approve Quote** and **Approve Terms** steps respectively.
- The **Approve Quote** activity will be executed by approvers in the “**Approvers**” role.
- The **Approve Deal** activity will be executed by the “**Contracts**” role.
- Both **Approve Quote** and **Approve Deal** can have 2 possible outcomes: **APPROVE** and **REJECT** similar to the **Business Practices Review** step.
- The process moves to **Save Quote** automated step if the outcome of both **Approve Quote** and **Approve Terms** is “**APPROVE**”. It loops back to **Enter Quote** step if either one or both of them is “**REJECT**”.
- The process ends after the execution of the **Save Quote** automated step.

The complete flow is shown in the figure below.



1.1.1 Opening the BPM Project for Sales Quote Process

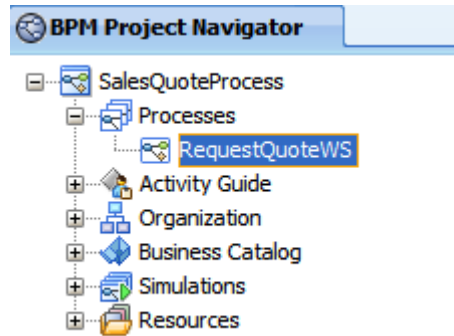
1. Unzip the SalesQuoteDemo.zip file.
2. This will create a top-level folder named "SalesQuoteDemo" and unzip the BPM Project contents under it.
3. Open **BPM Studio** by selecting the **Default** mode when you start **JDeveloper**.
4. Go to **File→Open** to launch the **Application** wizard.
5. The **File Chooser** window comes up.
6. Navigate to the "SalesQuoteDemo" folder. Drill-down 1 level and select the "SalesQuoteDemo.jws" file.
7. This will open the Sales Quote Workshop BPM Project.



1.1.2 Overview of Sales Quote Demo Project

8. Go to **View/BPM Project Navigator**.

9. Expand **SalesQuoteProcess/Processes** and select **RequestQuote** node. **SalesQuoteProcess** is the BPM Project and **RequestQuote** is the business process model. Each BPM Project can have multiple business processes.




10. Double-click on **RequestQuote** process node to open the sales quote process.

Note: The modeling notation followed here is BPMN 2.0.


11. Note that there are 4 swim lanes – “SalesRep”, “BusinessPractices”, “Approvers” and “Contracts” in the business process. These swim lanes denote process participants or roles that carry out these process steps. The association between process steps and roles are captured in this diagram.

Roles	Interactive process steps
Sales Rep	Enter Quote
Business Practices	Business Practices Review
Approvers	Approve Quote
Contracts	Finalize Contracts

12. Note also that different symbols or icons are used to denote the various process steps. The green rectangular box with the human icon represents an Interactive or human step. 

Note: The **Interactive Tasks** refers to a step that is managed by the workflow engine. The **Performers** represent the business users who need to carry out the Interactive Task. The associated Task (work to be performed) is shown in the inbox of the assigned **Performers** when the **Interactive Task** is triggered. The actual work is performed only when the **Performer** executes on his Task. The Task is presented to the Performers through a browser based worklist application. In BPM Studio, the Performer is automatically set to the “Role” associated with the swim lane in to which the Interactive Task is dropped.

Note: There is a special icon or marker on the Approve Quote Interactive step. This represents a more complex form of role assignment to the Interactive step.

13. The yellow rectangular box with the wheel and 2 green arrow spokes represent the business rules step. 

Note: The swim lanes or roles only matter for the Interactive step.

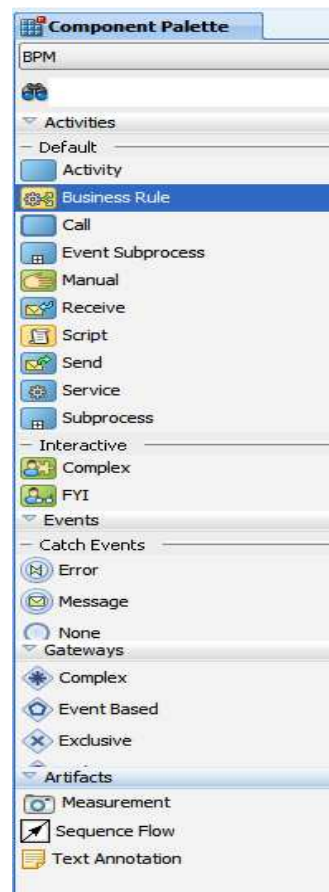
Moving the Interactive process activities across swim lanes changes the roles assigned to them.

You can also move swim lanes in the process model and rearrange them. The process is automatically refreshed to map to the new location of the swim lanes.

The rules step is an automated step that does not involve a human participant and can be placed in any swim lane.

14. Open up the **BPMN Component Palette** by going **View -> Component Palette**. The BPMN components consists of 4 main types of components :

- Activities that represent process steps,
- Gateways for splitting and merging paths,
- Events for generating and consuming business events and
- Artifacts for data, process metrics.




15. You are already familiar with the Interactive Task and Rules Task. Other interesting activities are

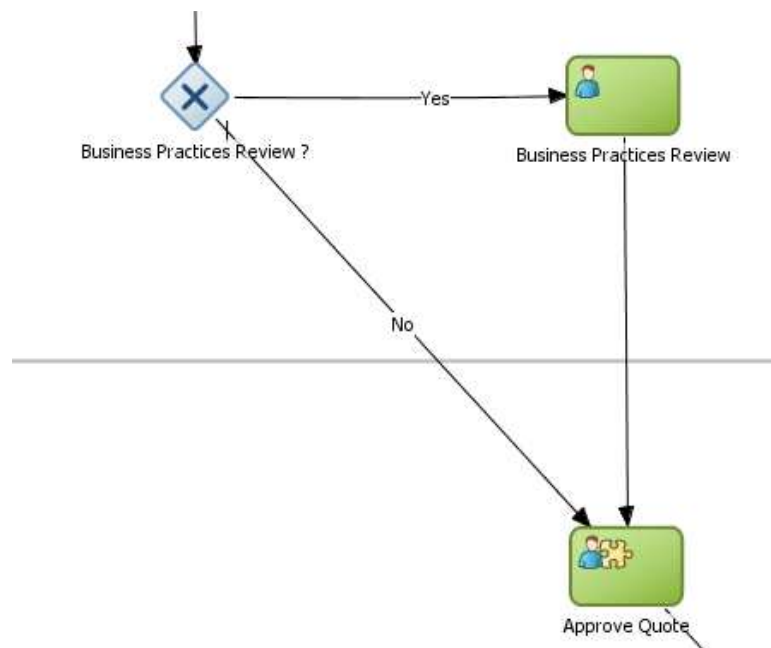
- Service Task to invoke an external service,
- Manual Task to carry out a manual step,

- Send Task to send a message to another process and
- Receive Task to receive a message from another process.

Note: Both Manual and Interactive Tasks are performed by a human but the former is not managed by a process execution engine while the latter is managed by a process execution engine.

16. In addition, to the process activities, the Sales Quote process also uses a Gateway BPMN object to capture a split decision. This is the **BPMN Exclusive (XOR)**

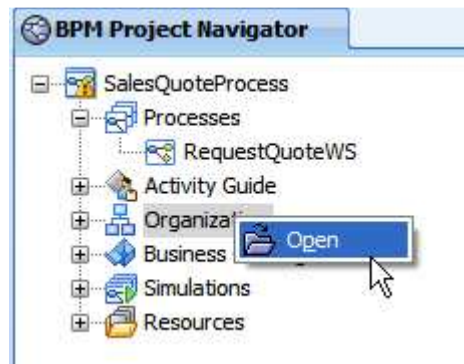
Gateway . Based on certain data conditions only one of the outgoing paths will be executed. In the Sales Quote process given here, based on evaluation of **Business Practices Review**, either the **Yes** path or the **No** path is taken. Note that the No path has a slash mark on it. This is used to denote a default sequential path.



1.1.3 Understanding Organization

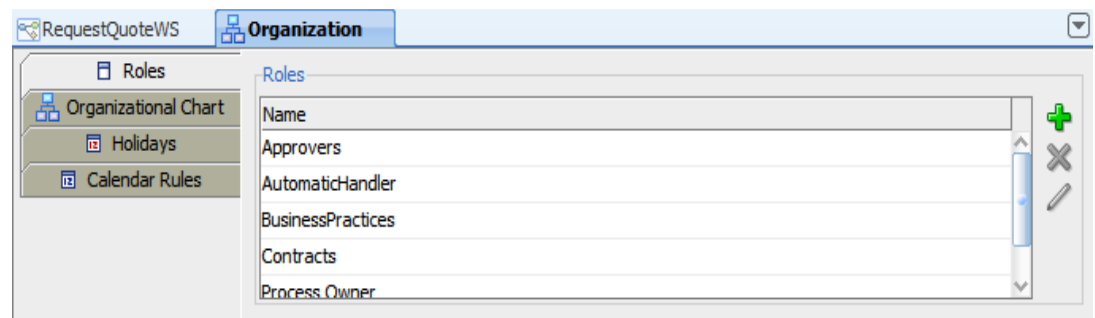
You learned in the previous section that swim lanes represent process roles. These are also referred to logical roles. To manage process participants, Studio's Organization Manager is used to define the organization, any organizational units, roles, users, and any calendar rules that may apply. This enables organizations to manage which people participate within a process, when they participate, and how much authority they have.

1. Go to **Organization node** under the **BPM Project**. Right-click and select **Open** to bring up the **Organization Editor**.



Note: In **BPM Studio**, the swim lanes in the BPMN process point to logical Roles. A logical role represents a process participant (user or group) and needs to be mapped to physical roles (LDAP users/groups) before the process is deployed. .

2. The Organization Pane shows the roles corresponding to the process swim lanes.

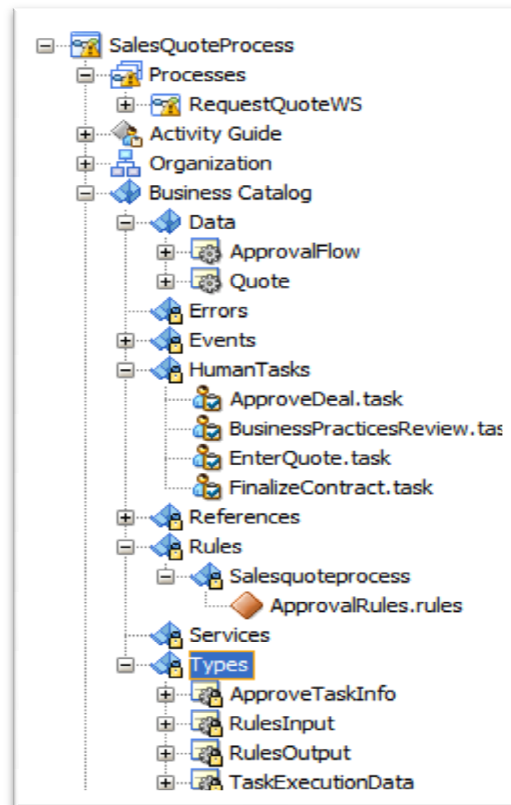


17. Close the **Organization** window.

This brings us to the end of the Sales Quote process overview. You are now ready to modify the process.

1.1.4 Business Catalog

Business Catalog holds several process related artifacts such as business data, business rules, business services, task services etc. The Business Catalog facilitates collaboration between business and IT Developer. It provides a mechanism for IT to provide building blocks such as business data, business services that can in turn be used by the business analyst/process designer/business user in implementing the business process. There are different folders for holding different types of BPM artifacts. Some folders have a lock to indicate that the artifacts inside them cannot be deleted. The artifacts under Data folder and Type folder are business data, the artifacts under the HumanTasks folder are Human Task Services, the artifacts under Rules are Rule Services and the artifacts under Services are business services.



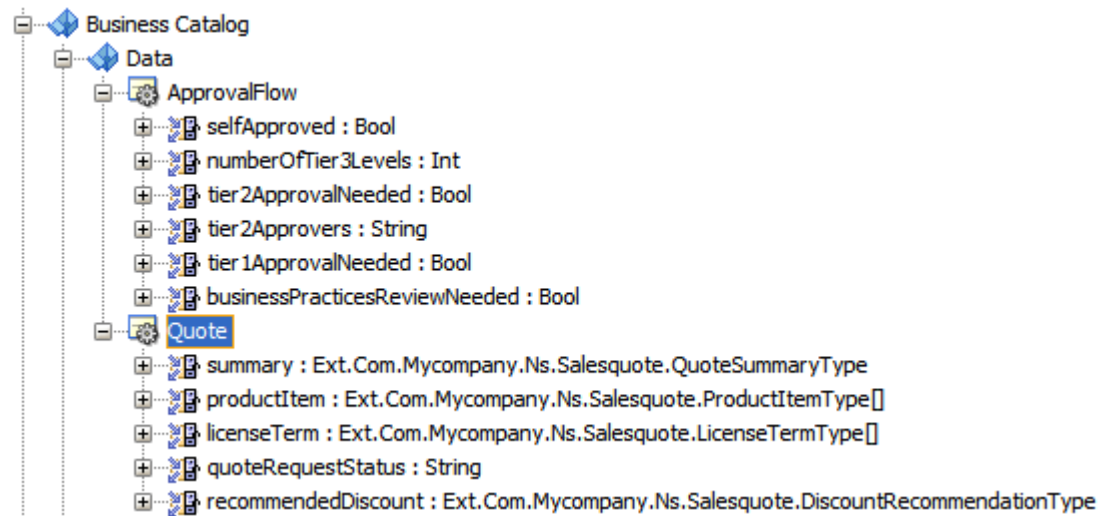
1.1.5 Business Data

The input to the process is “Quote” data. The Quote data contains information such as the set of products, the discount detail, the license terms the total net revenue, the sales rep responsible for the Quote, customer details etc. The other interesting data is the “Approval Flow” data that contains information about who needs to approve the Quote.

1.1.6 Business Objects

Complex types are referred to as Business Objects in BPM Studio and represented by XML Schema. Business Objects are stored under the Business Catalog folder.

In the **SalesQuoteDemo**, the **Business Object – Quote** and **ApprovalFlow** are the Business Objects. You can navigate to the Business Catalog/Data folder to view the structure for the **Quote** and **ApprovalFlow** Business Objects.



The source for both Quote and Approval Flow is **Quote.xsd** file. The former is based off the QuoteRequest element and the latter the ApprovalFlow element.

1.1.7 Data Objects

Data Objects represent Variables. Data Objects can be one of:

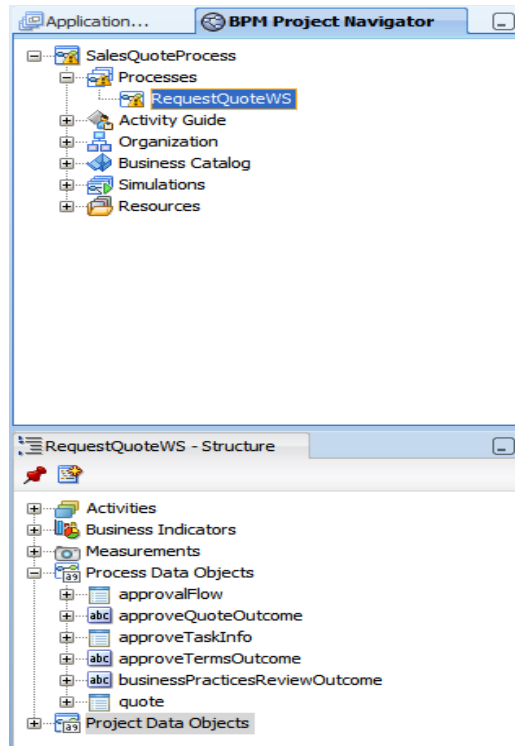
- **Process Level (Process Variables)** – Visible throughout the process and persisted through the life time of the process instance.
- **Activity Level (Local Variables)** – Visible within a particular scope of the process and lifetime of the Data Object is limited to the lifetime of the scope.
- **Project Level (BPM Project Variables)** – Visible across processes in a particular BPM Project.

Data Objects are typed. The types can be scalar or native type: String, Integer, Decimal, Boolean, Array or they can be complex types (Business Object). We have pre-created the following Data Objects for you.

Process Data Object	Purpose	Type
approveDealOutcome	Captures the outcome of Approve Quote step	String
approveTermsOutcome	Captures the outcome of Approve Terms step.	String
businessPracticesOutcome	Captures the outcome of Business Practices Review step.	String
approvalFlow	Is used to capture information regarding the tiers of approval required for Approve Quote step as well as the list of Approvers for each tier. In addition, captures whether Business Practices Review step is required or not.	ApprovalFlow in Quote.xsd
quote	Quote information	QuoteRequest in Quote.xsd

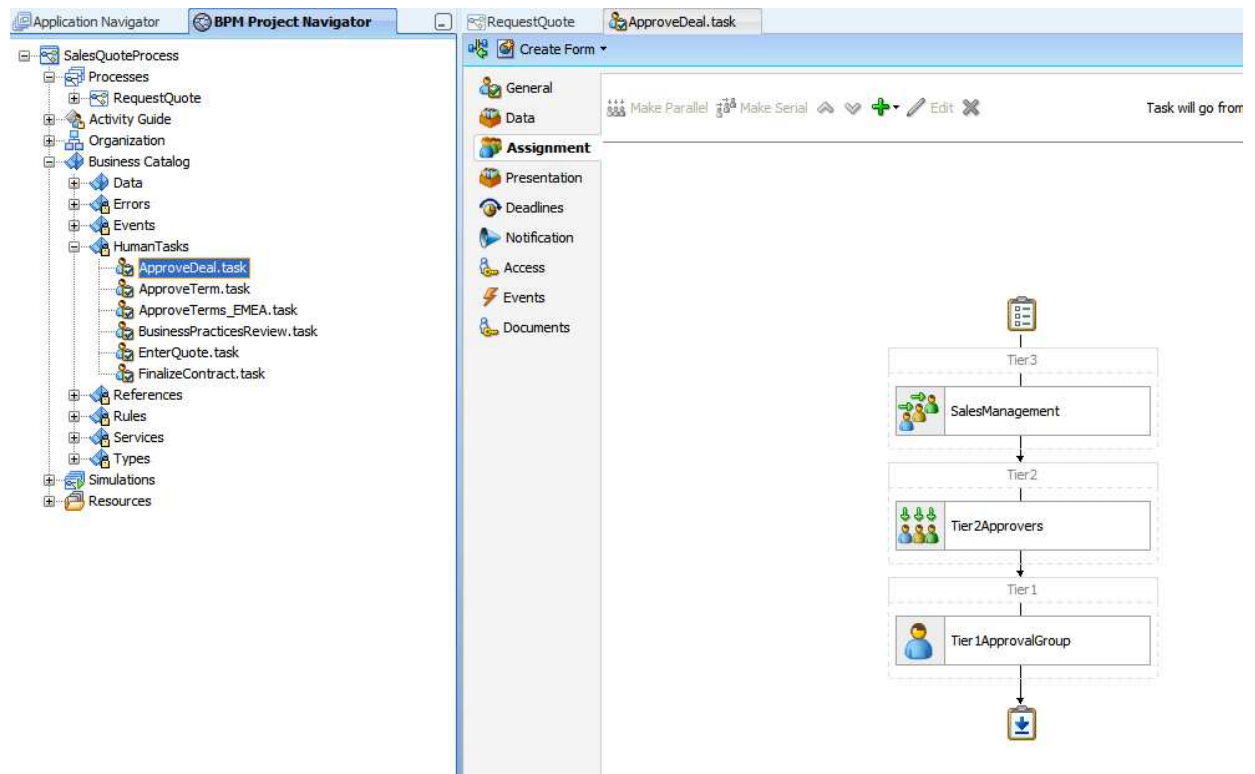
approveTaskInfo	Holds correlation information to enable Business Practices to change the approver list for Approve Quote within the Business Practices User Interfaces.	ApproveTaskInfo in Quote.xsd
------------------------	---	------------------------------

In the **BPM Project Navigator**, highlight the process and open up the **Structure Pane** (View→Structure).

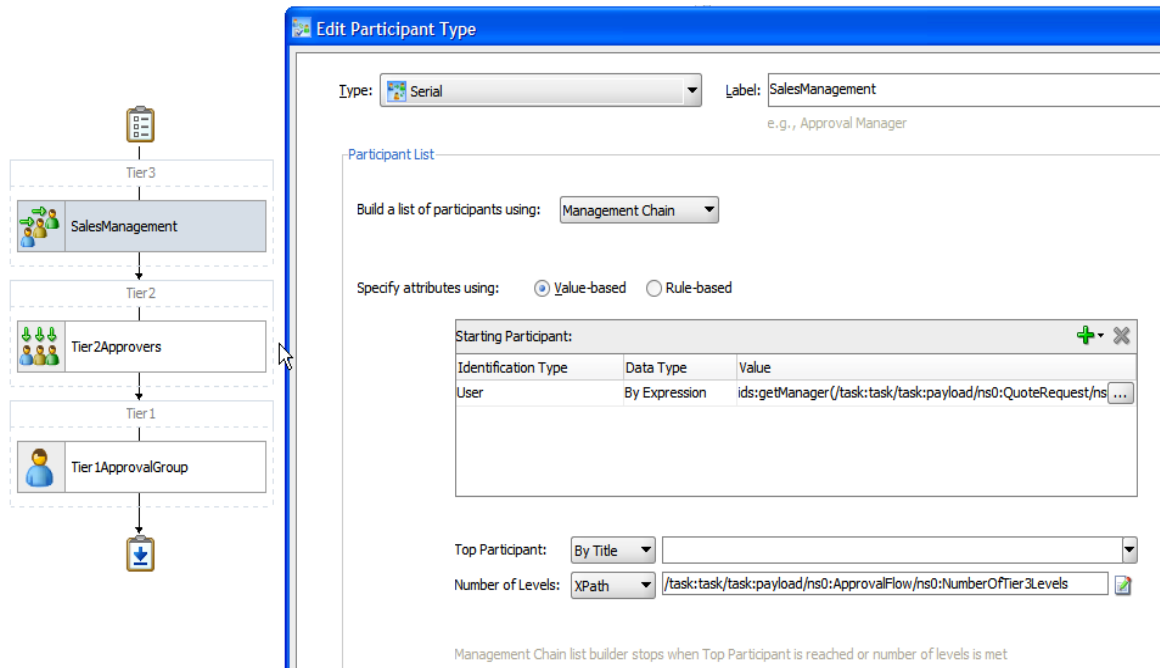


1.1.8 Understanding the Approve Quote Interactive Step

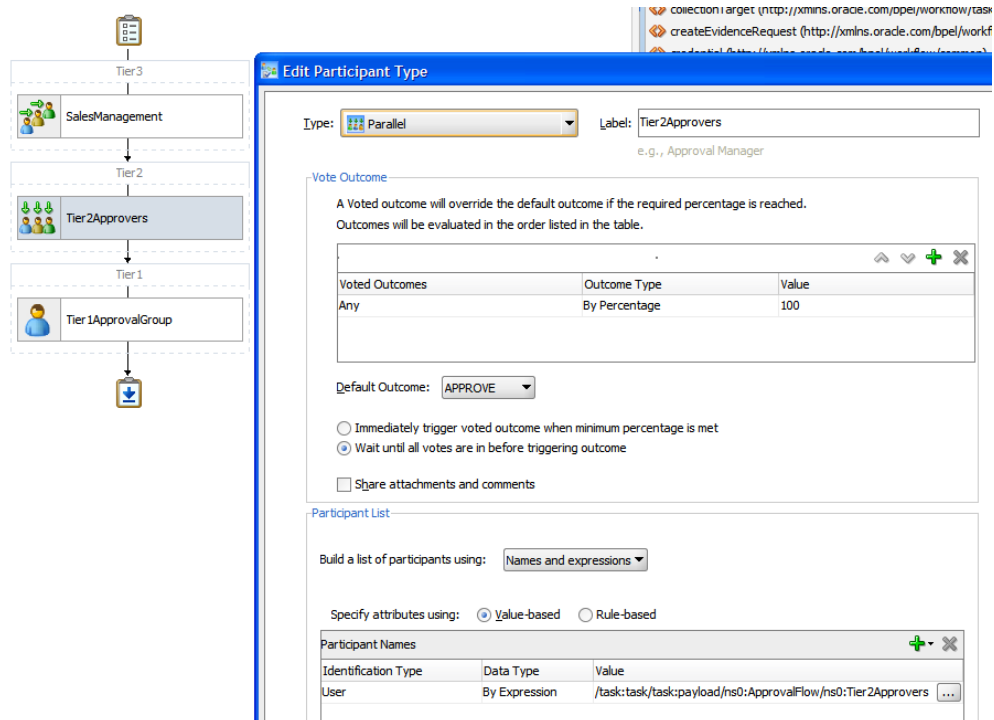
Oracle Human Workflow Service supports chaining tasks to create a task flow. The **Approve Quote Interactive step** has complex assignment and has 3 tiers of approvals namely – Tier1, Tier2 and Tier3. The tasks can be chained in sequential or parallel or a combination of both. You can navigate to the Business Catalog/Human Task/ApproveDeal.task node to view the task definition.



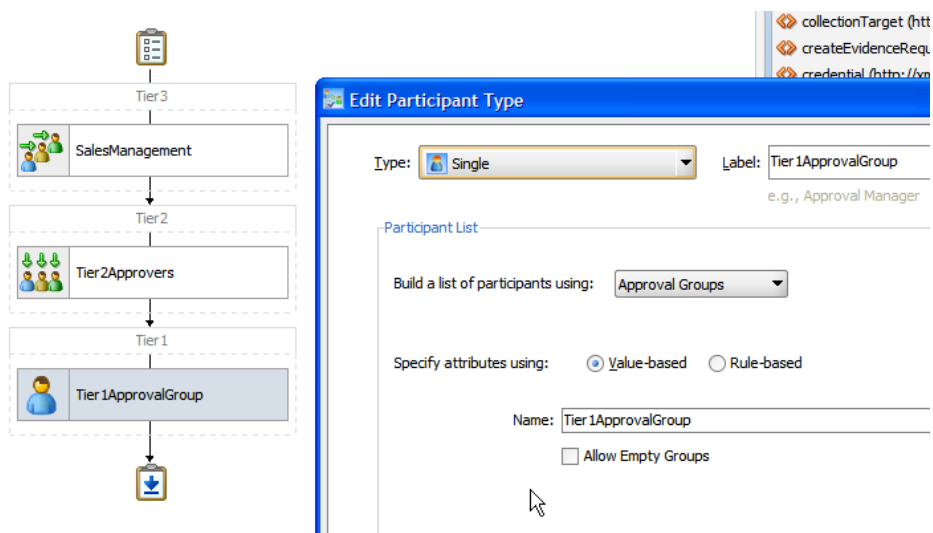
The Tier3 approval step is based off the Sequential Management Chain workflow pattern. The starting participant is the manager of the Sales Rep and this is dynamically set based off the incoming Quote data. The number of levels that need to be traversed across the management chain is determined by the Quote Approval Rules evaluation in the previous step. The Approval Flow - Rules Output contains this information. You can also skip the step based on whether the Approval Flow.selfApproval is set to "TRUE" by the Quote Approval Rules.



Tier2 Approvals is a Parallel Voting Pattern. The assignees are all the people belonging to the swim lane Role. Task is completed when all of the Voted Outcomes are in or if a certain percentage is met. Task status is calculated based on the evaluation of the Voted Outcomes. In this example, all Tier2 Approvers have to "APPROVE". The Tier2 Approver List is set by the Quote Approval Rules in the Approval Flow data object.



The Human workflow Service in Oracle BPM 11g supports Approval Management Extensions for sophisticated routing requirements including ability for business administrators to override process/rules determined flow. The Tier1 Approval is based off the Approval Management Extensions. The Tier1ApprovalGroup is created in the BPM Workspace.



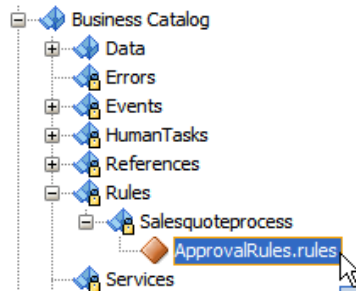
1.1.9 Understanding the Determine Approval Rules step

The Approval Rules in the Business Catalog of the Sales Quote BPM Project is used to determine the tiers that are required for approval of the incoming Quote data as well the list of approvers for each tier. In addition, it is used to determine whether **Business Practices** step is required or not. The Approval Rules for the Sales Quote Process is as follows:

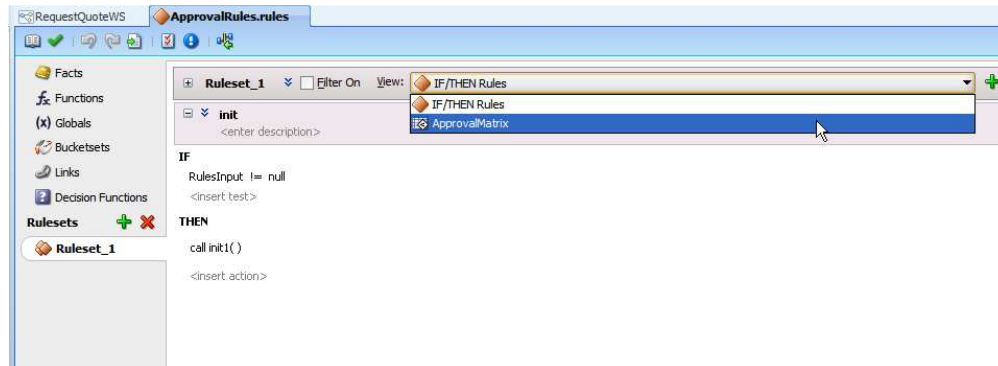
Condition based on incoming Quote data	Approvals Required for Approve Deal and if Business Practices Review Required.
If Discount <= 25%	Sales Rep can self approve. The Approve Deal step and the Business Practices Review step are completely bypassed.
If Discount is >25% but less than 60%	Business Practices Review is required. For Approve Deal step, the Tier 2 and Tier 1 Approvals are not required. However, the manager of the Sales Rep needs to approve as part of Tier3 Approval for the Approve Deal step
If Discount is between 60% to 90%	Business Practices Review is required. For Approve Deal step, the Tier 1 Approvals is not required. However, the manager of the Sales Rep needs to approve as part of Tier3 Approval for the Approve Deal step. In addition, as part of Tier2 Approval, "wfaulk" needs to approve as well.
If Discount is > 90% and Total Revenue is < 550000	Business Practices Review is required. For Approve Deal step, the Tier 1 Approvals is not required. However, the manager as well as the manager's manager (2 levels up the management chain) of the Sales Rep needs to approve as part of Tier3 Approval for the Approve Deal step. In addition, as part of Tier2 Approval for Approve Deal step, "wfaulk" needs to approve as well.
If Discount is > 60% and Total Revenue is > 550000	Business Practices Review is required. For Approve Deal step, all the 3 tiers of approvals are required including Tier 1 Approval. The manager as well as the manager's manager (2 levels up the management chain) of the Sales Rep needs to approve as part of Tier3 Approval for the Approve Deal step. In addition, as part of Tier2 Approval for Approve Deal step, "wfaulk" and "jlondon" needs to approve as well.

These rules are captured in the form of a Decision Table in the BPM Project provided to you. The Decision Table is easy to understand, create, and change by the business user.

To take a quick look at the **Approval Rules**, go to **Business Catalog/Rules/SalesQuoteProcess** and double-click on the .rules file.



- Go to Ruleset_1 and select ApprovalMatrix from the drop-down list as shown in the diagram.



- The Decision table looks like the screen shot below:

Ruleset_1 View: ApprovalMatrix					
ApprovalMatrix <enter description>					
Conditions	R1	R2	R3	R4	R5
C1 QuoteSummaryType.effectiveDiscount <= preApprovedDiscount	true	false			
C2 QuoteSummaryType.effectiveDiscount	-	<0.3,[0.3..0.6)	[0.6..0.9)	>=0.9	[0.6..0.9),>=0.9
C3 QuoteSummaryType.totalNetRevenue	-	-	-	<150000,[150000..55...	[550000..1500000),>...
Conflict Resolution					
Override					R3
Actions					
A1 modify result(businessPracticesReviewNeeded:boolean numberOfTier3Levels:int selfApproved:boolean tier1ApprovalNeeded:boolean tier2ApprovalNeeded:boolean tier2Approvers:String)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	false	true	true	true	true
	0	1	1	2	2
	true	false	false	false	false
	false	false	false	true	true
	false	false	true	true	true
	tier2Approvers-base	tier2Approvers-base	tier2Approvers-base	tier2Approvers-base	tier2Approvers-high

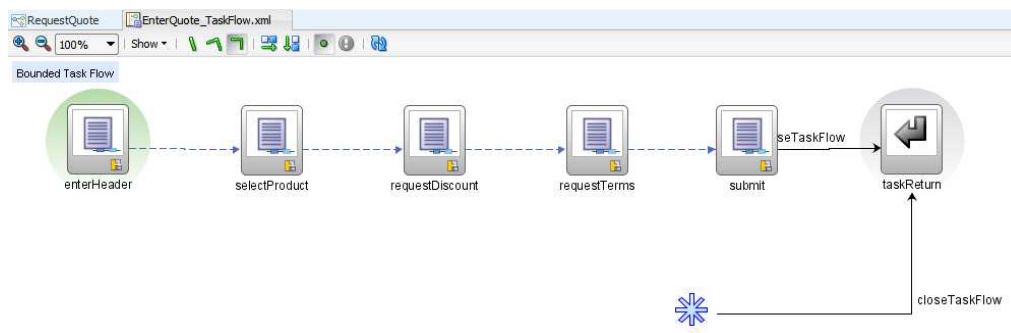
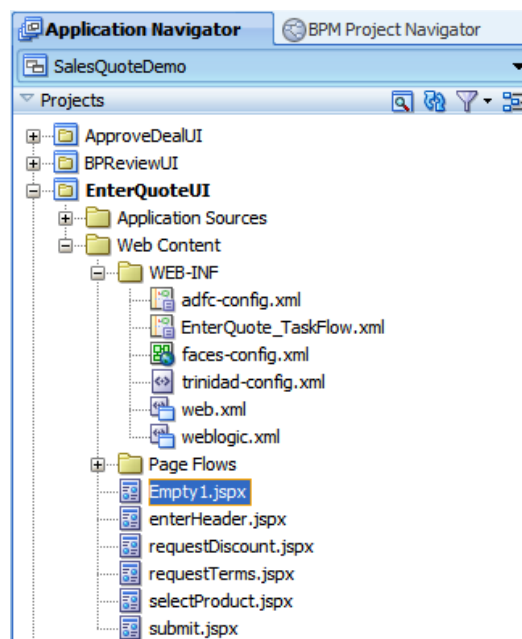
1.1.10 User Interfaces for the Sales Quote Process

The sales quote requires the following information to be captured from the user:

- Header-level information like customer address, contact information, type of customer, sales representative associated with this deal, industry type, etc.
- List of products for which the quote is being prepared
- Information for any discount being offered. The discount could be different for each selected product
- Any terms and conditions that need to be added to the quote

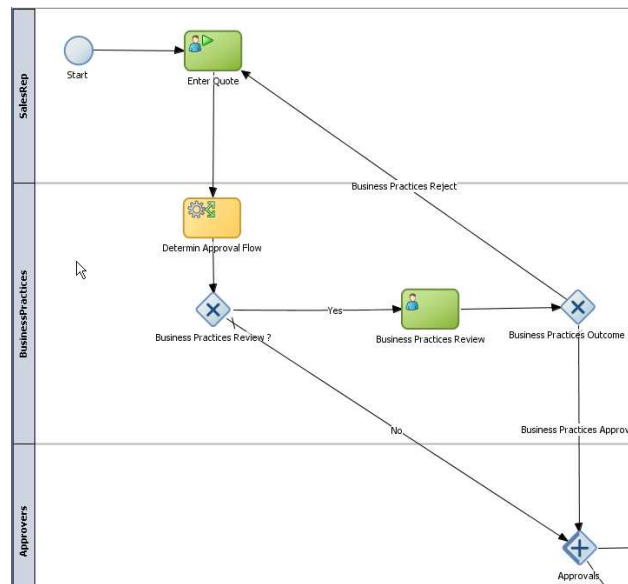
The Auto-generate option creates a default task-flow with a single page. To ease the page design, you are provided with page templates that already have the basic page layout completed. To create a multi-page flow the additional pages have to be created using the standard ADF page designer.

The Enter Quote UI project is the part of the Sales Quote Demo application that contains the user interfaces page flows for the Enter Quote step of the process. It is a multi-page flow with five pages.



1.1.11 Loops in the Business Process

The **Business Practices Review** – Interactive step can have 2 possible outcomes – “**APPROVE**” or “**REJECT**”. The “**APPROVE**” outcome continues the process on the forward going path. On the other hand, the “**REJECT**” outcome redirects the process back to the “**Enter Quote Details**” so that the Sales Representative can refine the quote and resubmit.

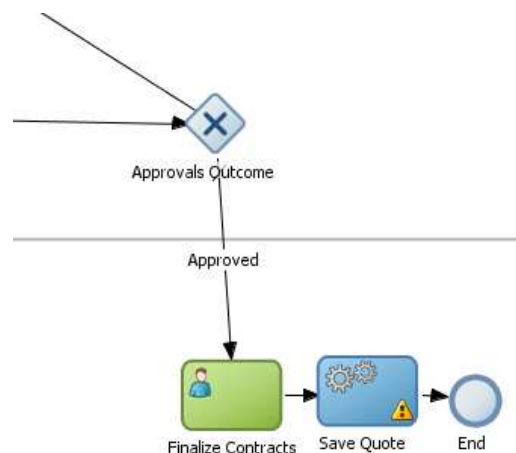


The **Exclusive (XOR) Gateway** is required to create a loop.

Similar to the **Business Practices Review** step, the **Approve Quote** and **Approve Terms** steps will also have 2 possible outcomes – “**APPROVE**” or “**REJECT**”. The “**APPROVE**” outcome continues the process on the forward going path and the “**REJECT**” outcome redirects the process back to the “**Enter Quote Details**”.

1.1.12 Understanding Save Quote Service Task

The Service Task represents an automated (system) invocation step. This is the last step in the process.



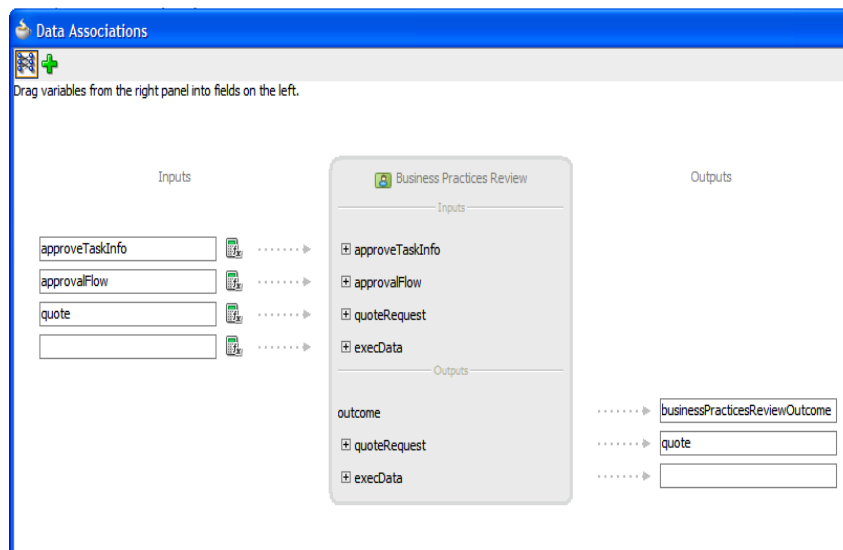
1.1.13 Understanding Data Associations

The input and output arguments of the process step are the same as the inputs and the outputs of the Service (Task, Rules, System) that it is bound to. The data objects (variables) are used for data transformation to match the input and output arguments of the process step.

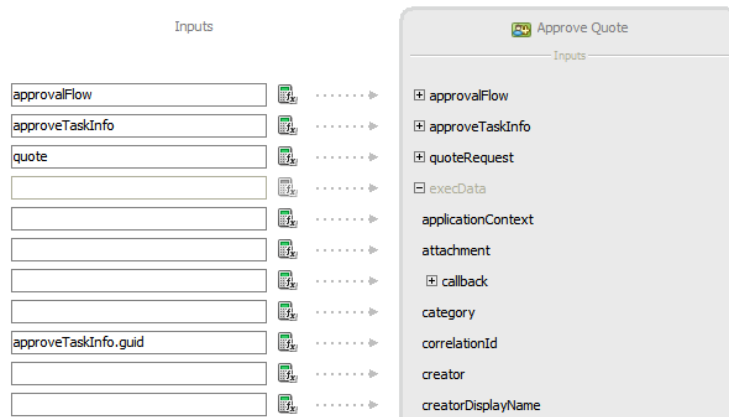
BPM Studio supports 3 ways of performing data mapping.

- **Simple Mode** – Business user friendly mode. The input/output arguments are mapped to data objects of similar type. Simple logical type of checks can also be done in the Simple mode.
- **XPATH Mode** – Involves XPATH expression editor for more complex mapping
- **XSLT Transformation** – Uses XSLT transformation for mapping the data objects to the input/output arguments.

In the case of Business Practices Review, the *outcome* output argument of the Business Practices Review step is mapped to the *businessPracticesReviewOutcome* String data object. In addition, the *approvalTaskInfo* data is also passed to this step to display the approval information in the *Business Practices Review* user interfaces. This is later used to validate if the process needs to go forward to *Approvals Gateway* or loop back to *Enter Quote*.



In the case of Approve Quote step, in addition to the approveTaskInfo, approvalFlow and quote data objects being mapped, the guid attribute of the approveTaskInfo also gets mapped to the correlation id. This mapping is done to correlate the routing slip changes made inside Business Practices Review user interfaces to propagate correctly to the Approve Quote step to set the assignees.



1.1.14 Understanding Business Indicators

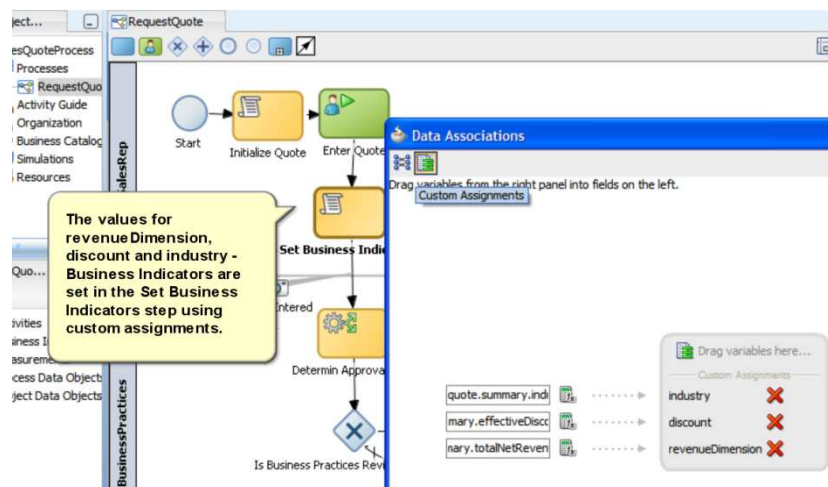
For the Sales Quote Demo process, we are interested in analyzing discounts offered and discount distribution across deal sizes (total net revenue) and industries.

Business Indicators are used to specify what process specific data should be captured. Business Indicators can be mapped like any other Data Object.

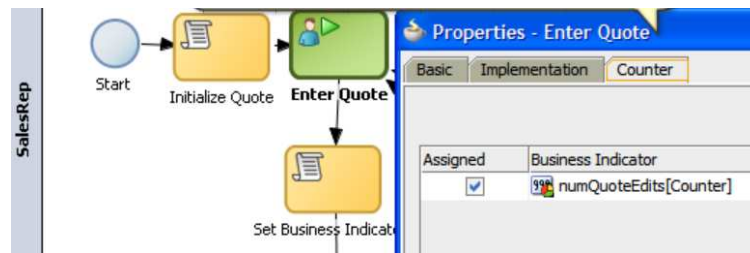
There are 3 types of Business Indicators supported:

- Measures – These are numerical data that typically signify a value that is interesting in process analytics. We need a measure for *discount*.
- Dimensions – These specify how process analytic data may be sliced. A dimension has to have a finite set of values. In cases where it is not, such as for numbers and date/time, a set of ranges must be specified for the data. We need dimensions for *industry* and *revenue*, where revenue is a numerical dimension, and needs ranges to be specified.
- Counters – As the name indicates, these are useful for counting iterations. We will add a counter to count number of times the quote needs to be revised. The number of iterations is clearly an interesting data point for analytics.

The values for *revenueDimension*, *discount*, and *industry* are set in the **Set Business Indicators Script** activity.



The Counter is set at the Enter Quote step. Right-click on the step and choose the Counter option. This brings up the Counter tab and you can choose the Counter to be incremented.



1.2 Running the Sales Quote Process

If you have not yet done so, complete the **Sales Quote Demo** setup instructions to configure your system and deploy the **Sales Quote Demo** application. Then, continue with the next step to run the process.

You must have completed the **Sales Quote Demo Setup** in order to run the process.

1.2.1 Workspace Overview

Oracle BPM's Workspace is a web application that allows you to interact with a process in relation to your assigned role or roles within your company. The Workspace helps you effectively and efficiently manage your tasks with minimal extra training. It serves as a portal, or window, into a business process for which you have an assigned role. When you select a pending task, the Workspace allows you to execute the transaction or transactions associated with the task. The Workspace allows you to access your work with an Internet browser from any location. You can use the Workspace interface like an e-mail reader to view incoming tasks for which you are responsible.

1.2.2 Logging in to Workspace

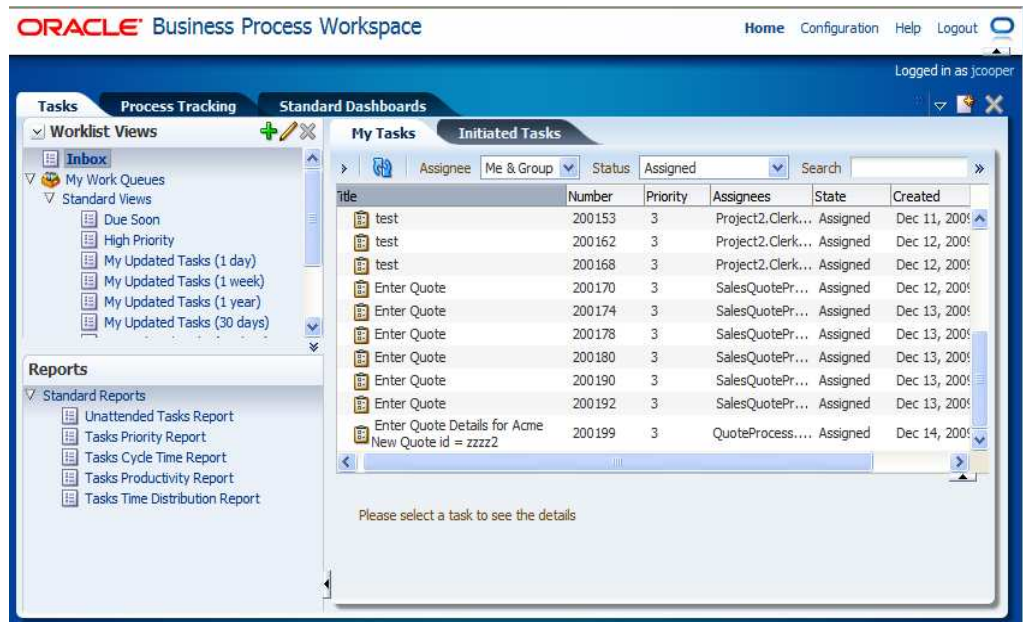
For each process in which you have been assigned a role, the Workspace displays your current tasks. The participants in the process and their roles and groups have already been created. Recall that:

- James Cooper (user id "jcooper") was assigned the Sales Representative (SalesRep) role and will be able to do the **Enter Quote** activity
- Jon Steinbeck (user id "jstein") was assigned the role "Business Practices" and will be able to do the Business Practices Review activity. He also has the role of the Process Owner and can perform process administrative functions.
- The participants for Approver role for Approve Quote step will be determined dynamically by the Determine Approvals Business Rule step.
- Charles Dickens (user id "cdickens") was assigned the role "Contracts" and will be able to perform both Approve Terms and Finalize Terms activities.

1. To access the workspace, type in

<http://localhost:7001/bpm/workspace> (with appropriate host and port for your configuration)

Log in as "jcooper/welcome1".



2. The **Inbox** option shows the list of task items assigned to you and your Group in the right pane of the WorkSpace (similar to an email inbox). If this is the first time you are using Workspace, you won't see any tasks listed.

Double-clicking a particular task item, opens the UI page associated with it in the section below as well as in a new window.

1.2.3 Triggering the Sales Quote Process

The **Sales Quote Demo** process is triggered by the arrival of a task item in the inbox of the Sales Representative role and this in turn activates the Enter Quote Details activity.

3. In order to generate a task item in the inbox, go to the **Applications** section on the left and click on the process. This generates a task item for the **Enter Quote** step and opens the task. Close the task here and go on to the next section.

1.2.4 Completing the Sales Quote Process instance

4. Refresh the Tasks list.
5. You will find that a new task item is now added to the Inbox of "jcooper".
6. Click on this instance to open the forms associated with the task.

This first panel contains basic information about the customer for which the quote is being requested.

Enter Quote Header

Quote Header

Opportunity ID: zzzz2

Sales Rep ID: jcooper

Sales Rep Name: James Cooper

Sales Rep:

Contact:

Account Name: Acme New

Customer Type:

Industry:

Valid Until: 5/30/2010

Purchase To Date:

Customer Address

Street: Demo Way

City: Redwood Shores

State: CA

Zip: 94065

Country: USA

Customer Contact Persons

Name	Title	Phone Number	Email Address
No data to display.			

5. Enter a value for **Industry** such as Software.
6. Click on the “**Select Products**” node in the bread crumbs trail at the top of the form and the panel below will change to the one for entering the products on the quote.
7. Drag BPM Suite to the Selected Products pane.
8. Enter 100 for the quantity of Oracle BPM Suite product.

Select Products

Available Products

Id	Name	Description	List Price
21	EBiz	EBusiness Suite	\$200,
22	SOA Suite	SOA Suite	\$55,0
23	BPM Suite	BPM Suite	\$115,
24	WebCenter Suite	Web Center Suite	\$90,0
25	IPM	Imaging and Proce...	\$75,0
26	UCM	Universal Content ...	\$100,
27	BPEL PM	BPEL Process Man...	\$100,
28	PEOPLESOFT	PeopleSoft	\$200,
29	SIEBEL	Siebel	\$150,
30	FINANCIALS	Oracle Financials	\$150,
31	IDENTITY_MGMT	Oracle Identity Ma...	\$100,
32	DATABASE_STD	Oracle Database S...	\$15,0
33	DATABASE_ENT	Oracle Database E...	\$20,0
34	DATABASE_RAC	Oracle Database E...	\$30,0

Selected Products

Product ID	Product Name	Quantity	List Price
23	BPM Suite	100	

9. Click on the “**Request Discounts**” entry on the bread crumbs trail.

10. Enter a discount of 70% and then click on **Request Terms**.

Enter Proposed Discount

Net Revenue \$3,450,000.00 Effective Discount 70%

Discounts

Product ID	Product Name	Quantity	Requested Discount	Pre Approved Discount	List Price
23	BPM Suite	100	70%	25%	\$115,000.00

11. Select the “NonStandardLicensing...” or any of the available ones and a proper type (this again can be any value from the drop down).

Business and License Terms

Category: NonStandardLicensingC Type: CancelAndReplace

12. Once the quote has been thoroughly created by the Sales Representative, it is time to submit. The final summary page is shown below (Submit Quote step in the top flow diagram).

Review and Submit Quote

Account Name: Acme New Total Net Revenue: \$3,450,000.00 Valid Until: 5/30/2010
Sales Rep Name: James Cooper Effective Discount: 70%

Products and Discounts

Product ID	Product Name	Quantity	Requested Discount
23	BPM Suite	100	70%

Business and License Terms

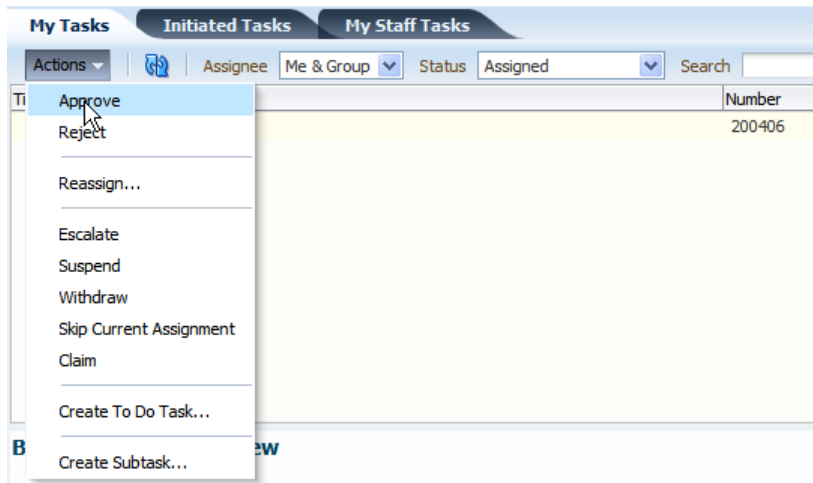
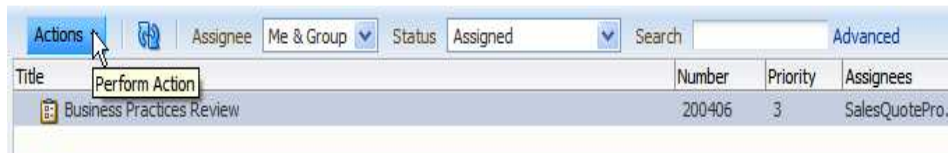
Category: No data to display. Type: No data to display.

Comments
No data to display

Attachments
No data to display

13. Click on the “SUBMIT” button to submit it to the next step. The task should disappear from jcooper’s inbox.

14. The data entered should trigger **Business Practices Review** to be true. In addition, all 3 tiers of approvals are required. Tier2 Approver list consists of "wfaulk, jlondon".
15. Log out as "jcooper" and log in as "jstein" to act on the **Business Practices Review** step. Click APPROVE on the Action menu.



16. The process now goes to the **Approvers** and **Contracts** role at the same time for the **Approve Quote** and **Approve Terms** process steps.
17. Log in as *jstein* or *wfaulk* for Tier-3, *wfaulk* or *jlondon* for tier-2, and *cdoyle* for tier1 to complete the **Approve Quote** step.
18. Log in as *cdickens* and perform approvals of **Approve Terms** and **Finalize Contracts** steps.
19. This completes the process.