

Oracle CPQ Site Administration Essentials LVC

Oracle Configure, Price, and Quote (CPQ) Cloud

DURATION

1 Days

MODULES

19 Lectures

COURSE CODE

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Course Overview

Site Administrators can use this course to gain proficiency in the core functions needed to administer their CPQ site on a day-to-day basis. Key topics covered in this course include managing user accounts, using the File Manager, creating and working with Data Tables, familiarity with the basics of the BML scripting language, an introduction to integration concepts, and using the Migration Center within CPQ.

What You Will Learn

Module 1: Managing Users

- Objectives
- Internal Users Link
- Active and Inactive Users
- User Types
- Administrator Access Control
- Adding a New User
- Standard User Permissions
- User Permissions & Access Permissions
- Restricted Access View
- Proxy Login
- User Administration List Pagination Control
- Summary

Module 2: Managing Groups

- Objectives
- Groups & Group Administration
- Adding a New Group – Sales Group
- Adding a New Group – Administrator Access Group
- Assign Access to Data Table Folders
- Assign Access to Product Family Folders

- Add Users to Administration Groups
- Enabling Administration Access Groups
- Summary

Module 3: Partner Organizations

- Objectives
- Internal Users Link
- Creating a Partner Organization
- Partner Organization User Names
- Adding User Accounts to Partner Organizations
- Summary

Module 4: File Manager

- Objectives
- File Manager Overview & Link
- Folders in File Manager
- File Manager Upload
- Replacing/Updating Files
- Moving Files
- File Manager Best Practices
- Referencing Files in File Manager
- Full Path URL & Secured Folders
- Summary

Module 5: Data Table Essentials

- Objectives
- Data Tables Overview & Access
- Data Table Editor Window
- Data Table Navigation Pane & Data Pane
- Natural Keys & Foreign Keys
- Creating, Converting, Removing Foreign Key Columns
- Data Table Search: Simple & Advanced Filters
- Filtering Data Tables
- Defining & Assigning User Access Rights
- Effects of User Access Rights
- Live Data Tables
- Deploying Data Tables
- Data Tables Best Practices
- Summary

Module 6: Importing & Exporting Data Tables

- Objectives
- Data Table Menu Options
- Formatting CSV for Upload

- Data Table Import & Status
- Data Table Export Scheduler
- Creating, Scheduling, Suspending, Resuming Exports
- Archiving & Viewing Export Logs
- Summary

Module 7: Using Secure Data Table Columns

- Objectives
- Secure Data Table Columns
- Secure Data Input & Output Forms
- Adding Secure Columns
- Summary

Module 8: Log Files

- Objectives
- Administration Logs & Display
- Performance Log & Print Example

Error Logs: printserver_stdout_dd.log, bm.log, modsec_debug_ohs.log, slow_thread_executions.log

- Downloading Error Logs
- Downloading User Login History (Bulk & Filtering)
- Troubleshooting Actions: LRTD & Enabling LRTD
- Summary

Module 9: Integration Essentials

- Objectives
- Integration Overview & CPQ Possibilities
- Transaction Integration Use Case
- Integration Methods & Criteria
- CPQ Technical Architecture
- FTP File Automation: Overview, Files, Examples
- FTP Automation: Multiple Controller Files & Import Migration Packages
- Email Notifications for FTP Uploads
- Real-Time Integration Setup & Triggering
- Transition Rule Notification Setup
- Integration Cloud Service (ICS) & Capabilities
- Summary

Module 10: Text Administration

- Objectives
- Accessing Text Administration
- Modifying System Text (Selecting & Results)
- Summary

Module 11: BML Essentials

- Objectives
- BML in Oracle CPQ
- Applying BML
- BML Function Editor: Configuration, Utility Library, Commerce
- Importing Attributes
- Function Wizard & Debugging
- BML Programming Structure & Script Requirements
- Comments in BML & Basic Syntax
- Summary

Module 12: BML Attributes & Arrays

- Objectives
- Attributes & Other Inputs
- Printing to Console
- Variables: Naming & Data Types
- Simple & Complex Data Types
- Arrays Overview & Index
- Summary

Module 13: BML Functions

- Objectives
- Function Basics & Syntax in BML
- Using Functions in BML
- String, Date, Math Functions
- adddays & datetostr Functions
- Date Format Components & Available Functions
- Transaction XML, Documents, Lines
- Advanced Modify Return Format
- Summary

Module 14: BML Conditions

- Objectives
- Conditional Expressions in Oracle CPQ & BML
- Advanced Conditional Expressions
- Conditional Expressions in Series & Else Statements
- Summary

Module 15: BML Loops

- Objectives
- Loops in BML & Loop Variables
- Append, Break, Continue

- Loop Counters & Range Function
- Example & Console Output
- Summary

Module 16: BML Dictionaries

- Objectives
- Recommended Items Return Format & Required Data
- Dictionary Fundamentals & Data Types
- dict, put, get, containsKey Functions
- Constraint Rule Return Types & Values
- Summing Similar Items Using a Dictionary
- Summary

Module 17: BMQL Essentials

- Objectives
- BMQL Overview, Return Data Type, Syntax Basics
- BMQL Components & Operators
- BMQL Results & Data Table Columns as Keys
- Steps to Retrieve Data & Code Example
- Handling User Inputs & haserror/getmessage Functions
- Summary

Module 18: Migration Essentials

- Objectives
- Common Environment Setup & Enterprise Environment Setup
- Accessing Migration Center
- CPQ Migrations: Items & Configuration Elements
- Migration Modes: Import from Source, Import Package, Connect to Destination
- Selecting Components for Migration
- Variable Names & Differences
- Cancel In-Progress Migration
- Summary

Module 19: Migration Packages

- Objectives
- CPQ Migration Packages
- Util Library Function: Lock & Unlock
- Override Functions & Package Considerations
- Importing Packages & Forward Version Package Migration
- Typical Package & Installation
- Migration Log & Audit Compliance
- Creating Snapshots & Rollback
- Cross Process Migration (CPM) & Limitations
- Performing CPM & Verifying Installation

- Cross Version Migration
- Summary