



CITY OF SAN ANTONIO
PUBLIC WORKS DEPARTMENT



COSA PRIMELink Vendor User Guide for PRIMAVERA UNIFIER

May 2022

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Vendor User Guide

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PAYMENT REQUESTS

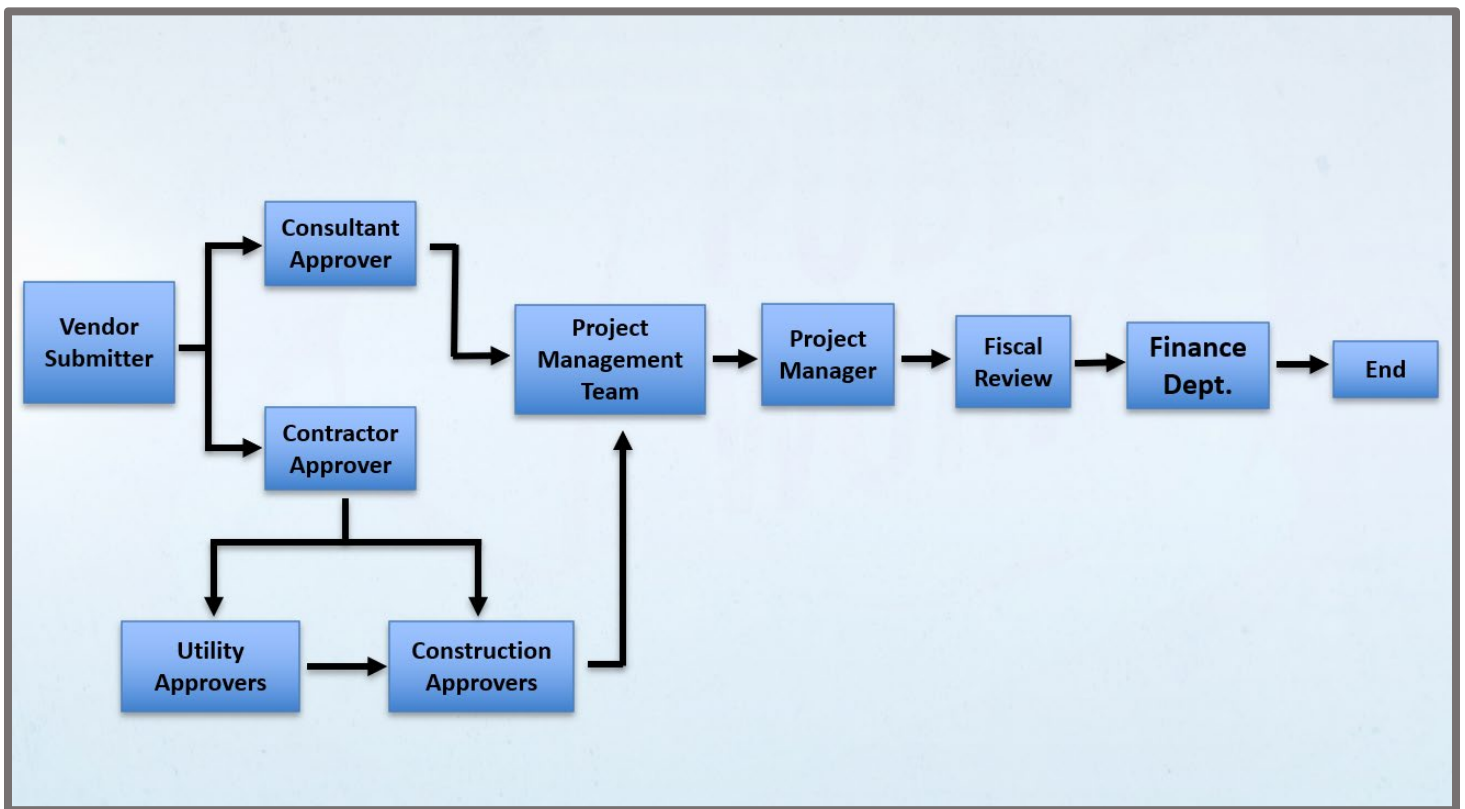
General

The Payment Request Business Process (BP) is used by vendors to submit their invoices for review and approval. A Payment Request can be submitted on standard or on-call contract. The BP is created by Vendor and is routed through the Consultant/Contractor and Utility if appropriate. For Street and Drainage projects, payment requests will be initiated by City of San Antonio Personnel.

Workflow

The workflow is shown in [Figure 1](#).

Figure 1 – Payment Request Workflow



Payment Request Business Process Location

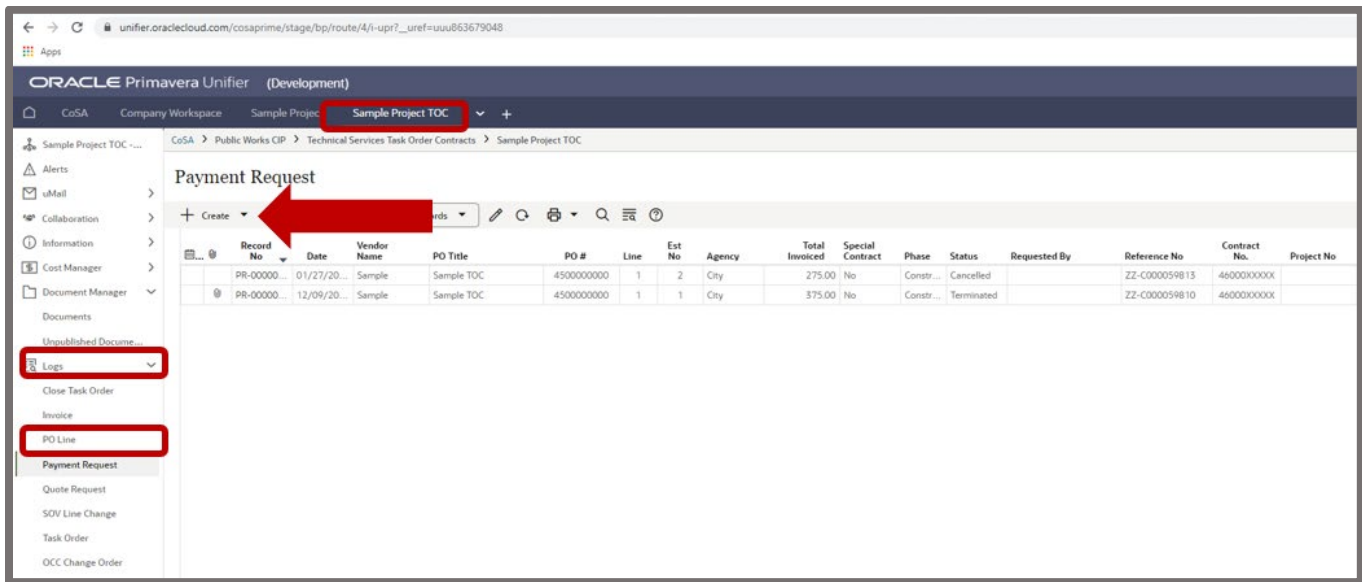
The Payment Request business process is located under the project in the Logs folder. See [Figure 2](#).

Creating a Payment Request

1. To create the Payment Request, go to Payment Requests located in the Logs folder under the project and click on Create. See [Figure 2](#).

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Figure 2 – Payment Request Location



2. The Header Form is displayed in [Figure 3](#). Select fields are highlighted below. See [Figure 3](#).

Figure 3 – Creating a New Payment Request

Create New Payment Request

Creation - Revise Invoice Request

General

Project ID: Project Name

Invoice Summary

Reference Commit: Type a PO Line ID... (Picker button)

Period To: MM/DD/YYYY

Check Stub Info: (Required)

Date: 05/23/2022

MSOS Total Amount: 0.00

Estimated Payment: 0.00

Managing Department

Invoice Detail

Invoice Identifier: Invoice #

Attachments

Comments Linked Records

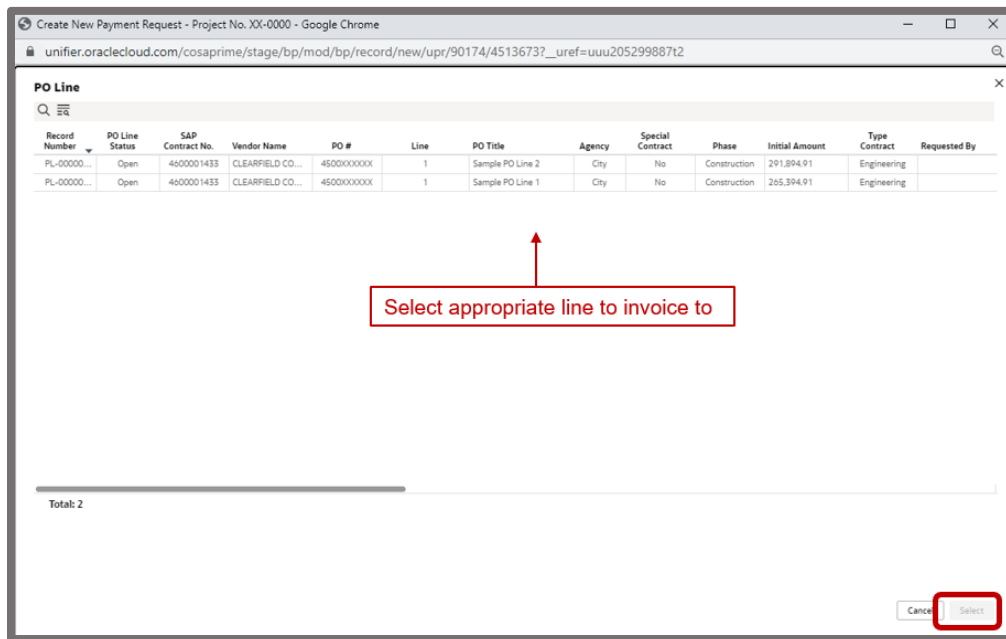
Instructions:

- Select once Creation-Revise section is complete
- Use picker to search for PO Line
- To add attachments
- Select Yes if it is the FINAL invoice
- Information to display on check stub or payment notification email

- Reference Commit – Choose the Purchase Order Line (PO Line) you will be invoicing this period by selecting the picker button. After selecting the picker, a separate window will display with a list of all the PO Lines that can be invoiced to. Choose the appropriate line from the list that is displayed. The PO Line Picker Button MUST be used; do not type PO number into the Reference Commit box. Note: Only select one item. Do not select any Bad or Closed items. See [Figure 4](#).

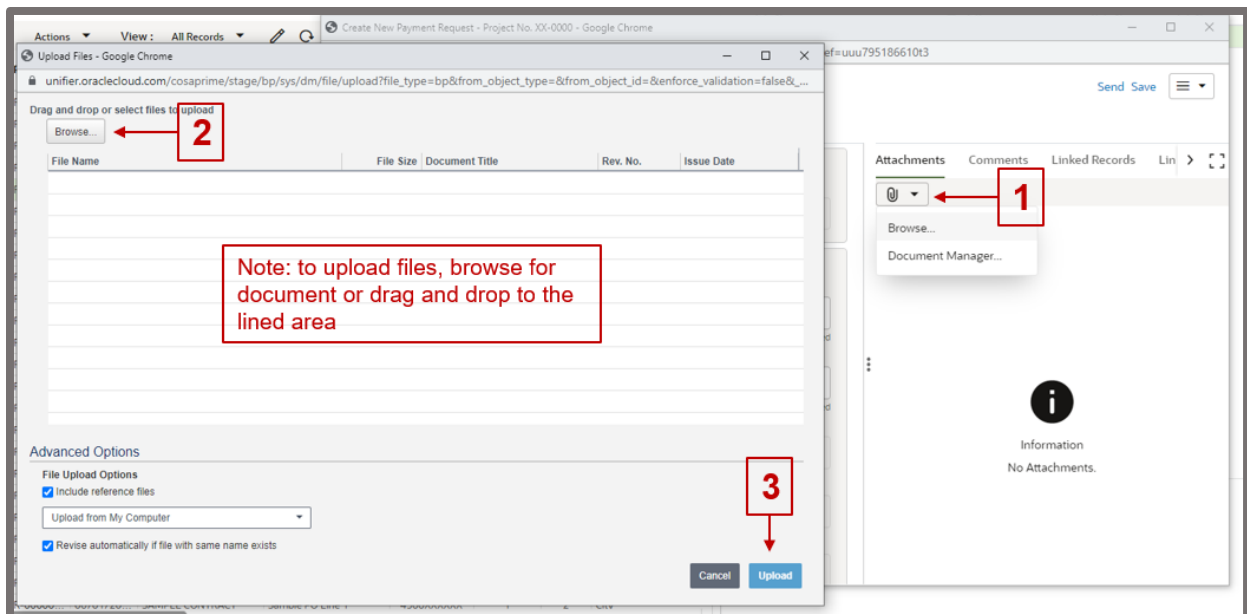
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Figure 4 – PO Line Picker



- b. Period To – Enter the invoicing period. You may use the calendar to pick the date or enter MM/DD/YYYY in the field.
- c. Check Stub Info – Enter text that you want displayed on your check stub or payment notification email. This can be an internal invoice number, application number, project or task order name, etc.
- d. Final Estimate – When you're submitting your final invoice select Yes from the drop-down menu, otherwise select No.
- e. Attachments – You may attach a document to the payment request by selecting the paperclip icon. You will then browse and select your desired document(s) to attach to the Payment Request. See [Figure 5](#).

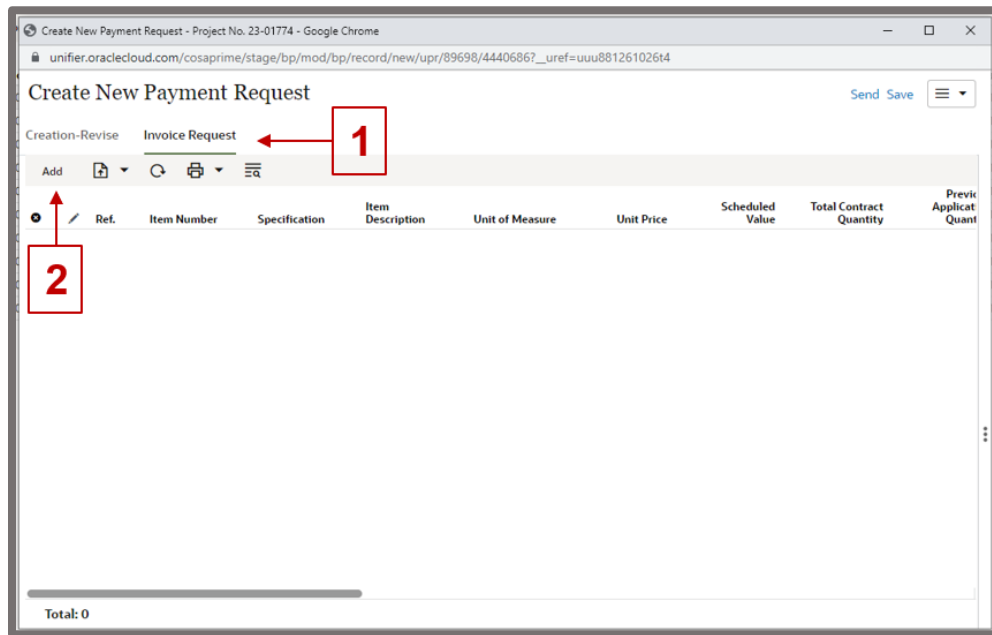
Figure 5 – Attachments



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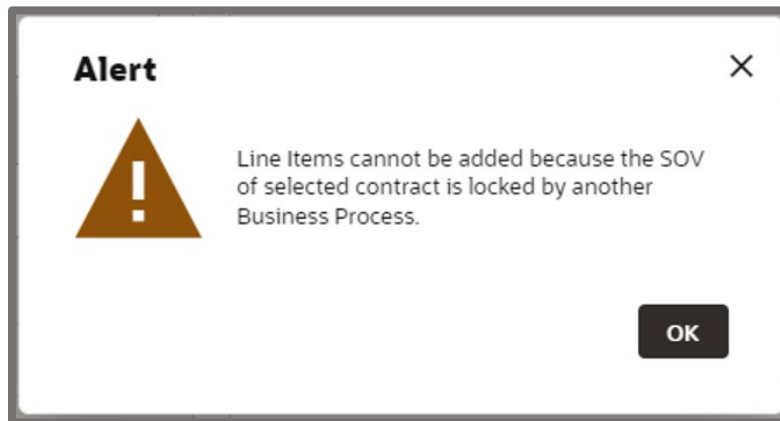
3. To invoice Schedule of Values (SOV), click on Invoice Request then select Add as seen in [Figure 6](#).

Figure 6 – Adding Line Items



4. If you see a box with a message as seen in [Figure 7](#) then you **CANNOT** do a payment request until the previous request has completed.

Figure 7 – Alert

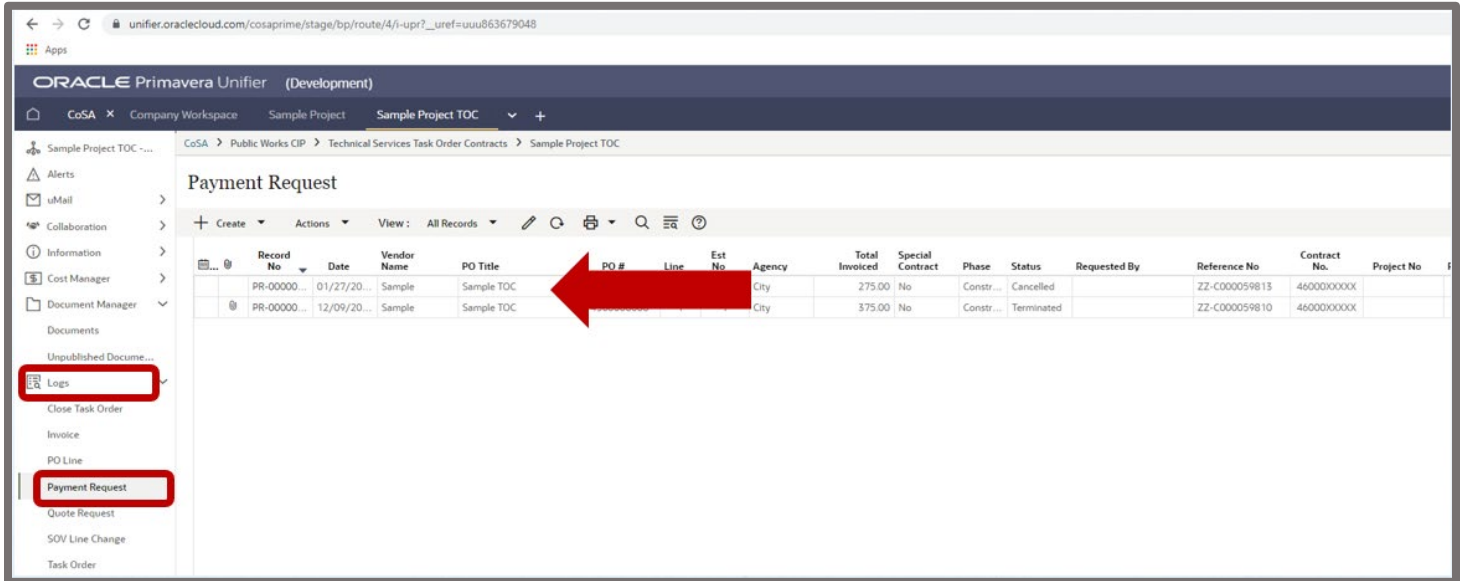


5. If you do not receive an Alert, a list of line items will populate where you will be able to enter your quantities. See [Figure 8](#).
6. Scroll on the bottom bar to the right until you see This Invoice Quantity and enter your quantities.
7. Scroll further right until you see the Materials Stored on Site (MSOS) amounts and enter the dollar amount of your MSOS.
8. Once items and amounts have been entered, save your progress and select Send to start the review/approval process.

Reviewing a Payment Request

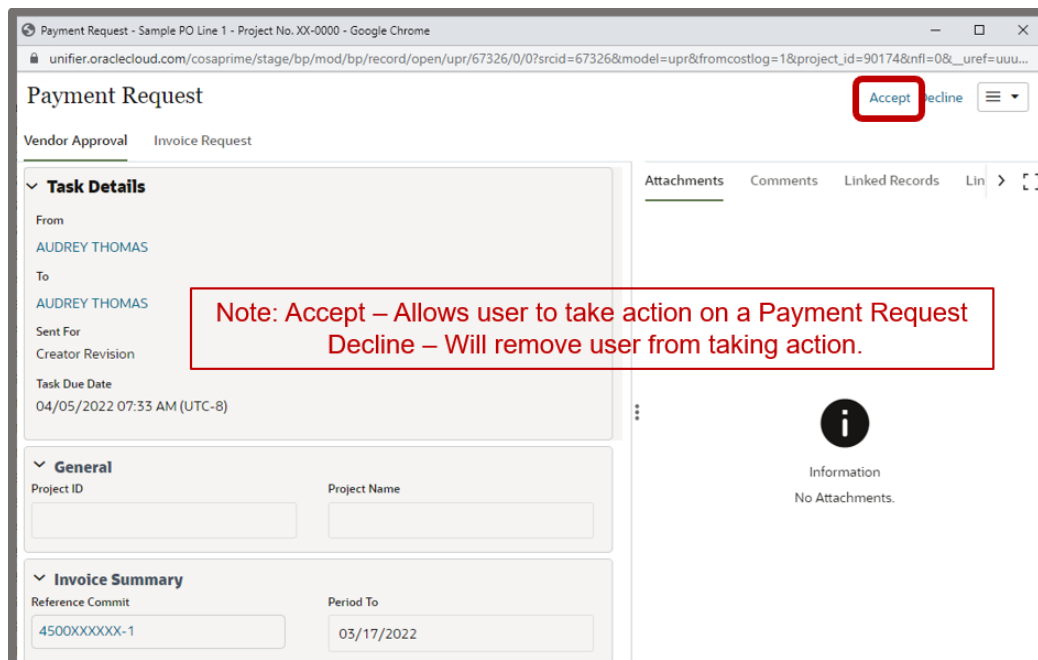
1. Locate and select the Payment Request that is pending review as seen in [Figure 10](#).

Figure 10 – Selecting Payment Request for Review



2. You have the option to either Accept or Decline a Payment Request. Accepting will allow you to take action on the BP. Declining will not reject the Payment Request but will remove you from taking action or responding. See [Figure 11](#).

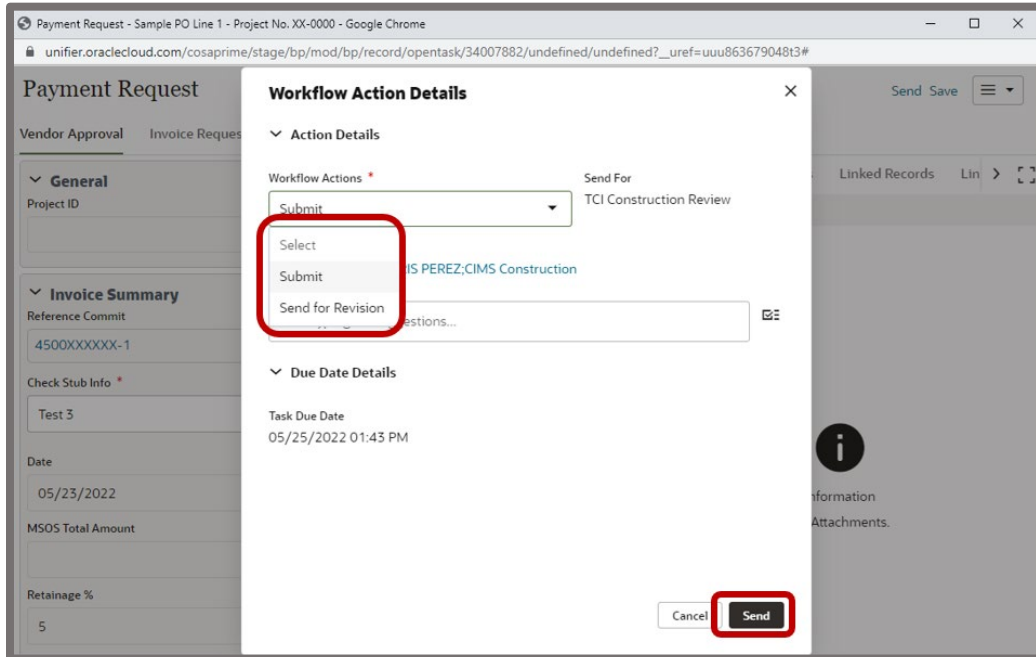
Figure 11 – Accepting / Declining



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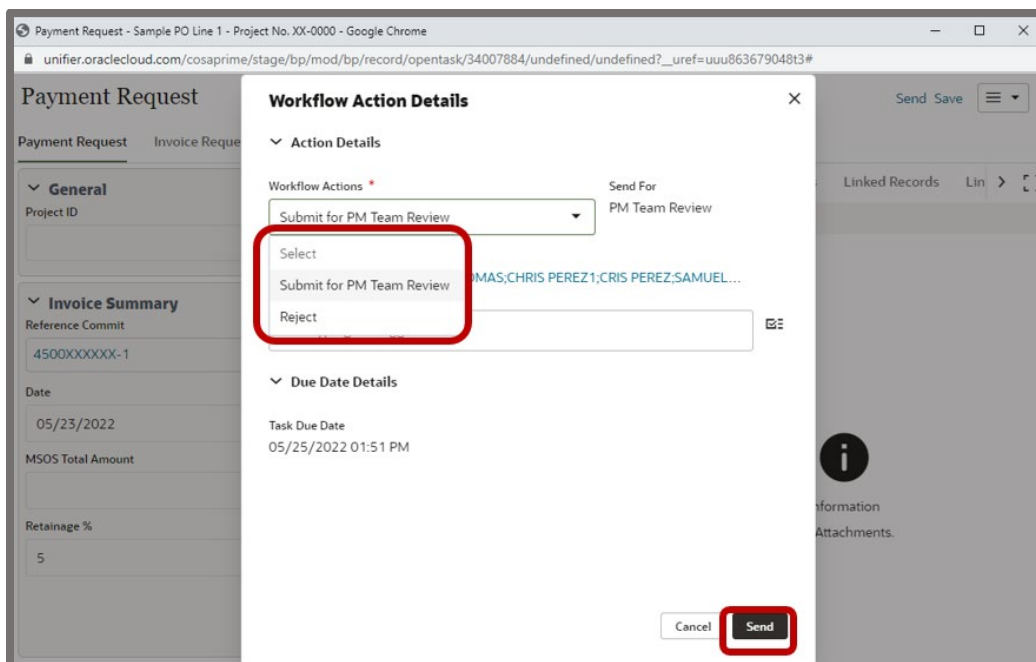
3. Vender Reviewers have the following options:
 - a. Submit – Sends the PR to the next reviewer in the workflow
 - b. Submit for Revision – Sends the PR back to the Creator for revision. See [Figure 12](#).

Figure 12 – Reviewer Options – Venders



4. Construction Reviewers may Submit for PRs for the following:
 - a. PM Team Review – Sends it to the Project Management Team for review.
 - b. Reject – Sends the PR back to the Creator for revision. See [Figure 13](#).

Figure 13 – Reviewer Options – Construction Reviewers



Revising a Payment Request

A payment request that is rejected will be sent to the creator as a task and can either be Revised or Cancelled. The creator's response will be dictated by the reason for prior rejection and whether there is one or more than one approver.

1. The Creator will either Accept or Decline the request. A user will not be able to revise or take an action on a payment if Decline is selected. See [Figure 14](#).

Figure 14 – Accepting the Task

The screenshot shows a web browser window titled "Payment Request - Sample PO Line 1 - Project No. XX-0000 - Google Chrome". The URL is "unifier.oraclecloud.com/cosaprime/stage/bp/mod/bp/record/open/upr/67326/0/0?srcid=67326&model=upr&fromcostlog=1&project_id=90174&nfi=0&_uref=uuu...". The page title is "Payment Request". There are two tabs: "Vendor Approval" and "Invoice Request". The "Vendor Approval" tab is active. In the top right corner, there are two buttons: "Accept" (highlighted with a red box) and "Decline". Below the tabs, there is a "Task Details" section with fields for "From" (AUDREY THOMAS), "To" (AUDREY THOMAS), "Sent For" (Creator Revision), and "Task Due Date" (04/05/2022 07:33 AM (UTC-8)). To the right of this section, there is a red box with the text: "Note: Accept – Allows user to take action on a Payment Request Decline – Will remove user from taking action." Below the "Task Details" section, there is a "General" section with fields for "Project ID" and "Project Name". Below the "General" section, there is an "Invoice Summary" section with fields for "Reference Commit" (4500XXXXX-1) and "Period To" (03/17/2022). On the right side of the page, there is a section titled "Attachments" with a sub-section "Comments" and a "Linked Records" section. Below the "Comments" section, there is a red box with the text: "Information No Attachments."

2. Typically, rejected payment requests will contain comments left by other users. These comments may be useful for understanding why a payment request was rejected and the item or items that may need revising. See [Figure 15](#).

Figure 15 – Reviewing the Comments

The screenshot shows a web browser window titled "Payment Request - Sample PO Line 1 - Project No. XX-0000 - Google Chrome". The URL is "unifier.oraclecloud.com/cosaprime/stage/bp/mod/bp/record/opentask/34006423/undefined/undefined?_uref=uuu37682865110". The page title is "Payment Request". There are two tabs: "Payment Request" and "Invoice Request". The "Payment Request" tab is active. In the top right corner, there are two buttons: "Send" and "Save". Below the tabs, there is a "General" section with fields for "Project ID" and "Project Name". Below the "General" section, there is an "Invoice Summary" section with fields for "Reference Commit" (4500XXXXX-1), "Period To" (01/28/2022), "Date" (02/28/2022), "Application No" (17), "MSOS Total Amount" (0.00), "Total Invoiced Amount" (0.83), "Retainage %" (5), "Estimated Payment" (0.79), and "Final Estimate?" (No). To the right of this section, there is a red box with the text: "Files can be attached to comments". Below the "Invoice Summary" section, there is an "Invoice Detail" section with fields for "Invoice Identifier" and "Invoice #" (INV-0000024). On the right side of the page, there is a section titled "Attachments" with a sub-section "Comments" (highlighted with a red box) and a "Linked Records" section. Below the "Comments" section, there is a red box with the text: "Enter Comment". Below the "Enter Comment" box, there is a "Post" button (highlighted with a red box). Below the "Post" button, there is a section titled "Posted by:" with a dropdown menu showing "Show All". Below the dropdown menu, there is a comment from "CRIS PEREZ City of San Antonio" dated "02/28/2022 12:55 PM" with the text "Rejected due to quantities being incorrect." Below the comment, there is a red box with the text: "Comments will be shown here. Once a comment is posted, it cannot be removed."

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3. Select the Invoice Request tab to access the line item(s).
4. To change a line amount, click on that line and correct the This Invoice Quantity field. See [Figure 16](#).
5. Once completed, select Save on the upper right corner to record and save the changes made to the line item(s). Confirm new Invoice Amount and resubmit as seen on Steps 8 & 9 of Creating a Payment Request.

Figure 16 – Changing a Line Amount

Payment Request - TO-1 - Project No. 4X000xxxxx - Google Chrome

unifier.oraclecloud.com/cosaprim/stage/bp/mod/bp/record/opentask/34007886/undefined/undefined?_uref=uuu863679048t5

Payment Request

Creation - Revise Invoice Request

Send Save

Cancel Error Check Save

Revise quantity if applicable

of Measure	Unit Price	Scheduled Value	Total Contract Quantity	Previous Application Quantity	This Invoice Quantity *	Total Application Quantity	Invoice Amount	MSOS Previous Amount
1.00	0.00	0.00	0	0	5	5	5.00	0.00
0.50	850.00	1,700	0	0	0	0	0.00	0.00
2.00	0.00	0	0	0	0	0	0.00	0.00
1.00	6,264.00	6,264	0	0	0	0	0.00	0.00
1.00	0.00	0	0	0	0	0	0.00	0.00
0.50	0.00	0	0	0	0	0	0.00	0.00
20.00	0.00	0	0	0	0	0	0.00	0.00
7.00	280.00	40	0	0	0	0	0.00	0.00
16.00	6,400.00	400	0	0	0	0	0.00	0.00
100.00	0.00	0	0	0	0	0	0.00	0.00
9.00	0.00	0	0	0	0	0	0.00	0.00
14.00	0.00	0	0	0	0	0	0.00	0.00
11.00	18,700.00	1,700	0	0	0	0	0.00	0.00
13.00	0.00	0	0	0	0	0	0.00	0.00
35,287.00	192,075.00	13,996	0	5	5	5.00	0.00	

Total: 116

6. Select Submit to send the Payment Request back to the workflow. PR creation revisions are a two-step approval process that must go through Vendor approval and back to the workflow. See [Figure 17](#).

Figure 17 – Sending

Payment Request - TO-1 - Project No. 4X000xxxxx - Google Chrome

unifier.oraclecloud.com/cosaprim/stage/bp/mod/bp/record/open/upr/67332/0/0?srcid=67332&model=upr&fromcostlog=1&project_id=901818&nfl=0&_uref=uuu...

Payment Request

Creation - Revise Invoice Request

Send Save

Linked Records Lin > <

Workflow Action Details

Workflow Actions *

Resubmit

Select

Resubmit

Cancel

Send For

Vendor Approval

Due Date Details

Task Due Date

05/25/2022 02:10 PM

Cancel Send

Payment Request Status

1. Select the On-Call Contract or Project that pertains to the Payment Request
2. Select Payment Request under the Logs tab
3. Click once on the Payment Request to open a side window.
 - a. Record Details, Workflow Progress, and Attachments can be previewed from here.

Figure 18 – Sideview

Clicking on the PR once will open a side window where Record Details, Workflow Progress, and Attachments can be previewed.

Record No	Date	Vendor Name	PO Title	PO #	L...	Est No	Agency	Total Invoiced	Special Contract	Phase	Status	Requested By	Reference
PR-0000002	01/27/20...	Sample	Sample TOC	4500000000	1	2	City	275.00	No	Construction	Cancelled		ZZ-C000
PR-0000001	12/09/20...	Sample	Sample TOC	4500000000	1	1	City	275.00	No	Construction	Terminated		ZZ-C000

Step Name	Assignee	Company	Status	Action	Completion Date
Creation	CHRIS PEREZ1	SAMPLE COMPANY	Completed	Submit For Vend...	01/27/2022 12:52 PM (UTC-8)
Vendor Approval	CHRIS PEREZ1	SAMPLE COMPANY	Closed	Revise	01/27/2022 12:53 PM (UTC-8)
Creator Revision	CHRIS PEREZ1	SAMPLE COMPANY	Closed	Resubmit	01/27/2022 12:54 PM (UTC-8)
Vendor Approval	CHRIS PEREZ1	SAMPLE COMPANY	Completed	Submit for Techni...	01/27/2022 12:55 PM (UTC-8)
Technical Service...	CHRIS PEREZ1	SAMPLE COMPANY	Completed	Reject	02/02/2022 01:46 PM (UTC-8)
Creator Revision	CHRIS PEREZ1	SAMPLE COMPANY	Completed	Cancel	02/10/2022 09:24 AM (UTC-8)
End	Ashish Tripathi	HVJ South Centra...	View Only		
End	ANTONIO AGUILAR	City of San Antonio	View Only		
End	CRIS PEREZ	City of San Antonio	View Only		
End	CHRIS PEREZ1	SAMPLE COMPANY	View Only		
End	NAVELLA PEDRA...	City of San Antonio	View Only		

4. Double-click to open the Payment Request.
5. On the right side of the Payment Request window is a section where Attachments, Comments, Linked Records, Linked Mail, Workflow Progress, Audit Log, and Reference Records can be viewed.
6. Click on the Arrow until Workflow Progress is in view. See [Figure 19](#).

Figure 19 – Payment Request Status

1. Sample Project TOC

2. Payment Request

3. Payment Request

4. Agency

5. Workflow Progress

6. Workflow Progress

Record No	Date	Vendor Name	PO Title	PO #	L...	Est No	Agency	Total Invoiced	Special Contract	Phase	Status	Requested By	Reference
PR-0000002	01/27/20...	Sample	Sample TOC	4500000000	1	2	City	275.00	No	Construction	Cancelled		ZZ-C000
PR-0000001	12/09/20...	Sample	Sample TOC	4500000000	1	1	City	275.00	No	Construction	Terminated		ZZ-C000

Step Name	Assignee	Company	Status
Creation	CHRIS PEREZ1	SAMPLE COMPANY	Completed
Vendor Approval	CHRIS PEREZ1	SAMPLE COMPANY	Closed
Creator Revision	CHRIS PEREZ1	SAMPLE COMPANY	Closed
Vendor Approval	CHRIS PEREZ1	SAMPLE COMPANY	Completed
Technical Service...	CHRIS PEREZ1	SAMPLE COMPANY	Completed
Creator Revision	CHRIS PEREZ1	SAMPLE COMPANY	Completed
End	Ashish Tripathi	HVJ South Centra...	View Only
End	ANTONIO AGUILAR	City of San Antonio	View Only
End	CRIS PEREZ	City of San Antonio	View Only
End	CHRIS PEREZ1	SAMPLE COMPANY	View Only
End	NAVELLA PEDRA...	City of San Antonio	View Only

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7. Use the scroll bar at the bottom scroll between all the details of the Workflow Progress. See [Figure 20](#).
8. Selecting View Graphic will open a separate window with a graphic representation of the workflow. See [Figures 20](#) and [21](#).

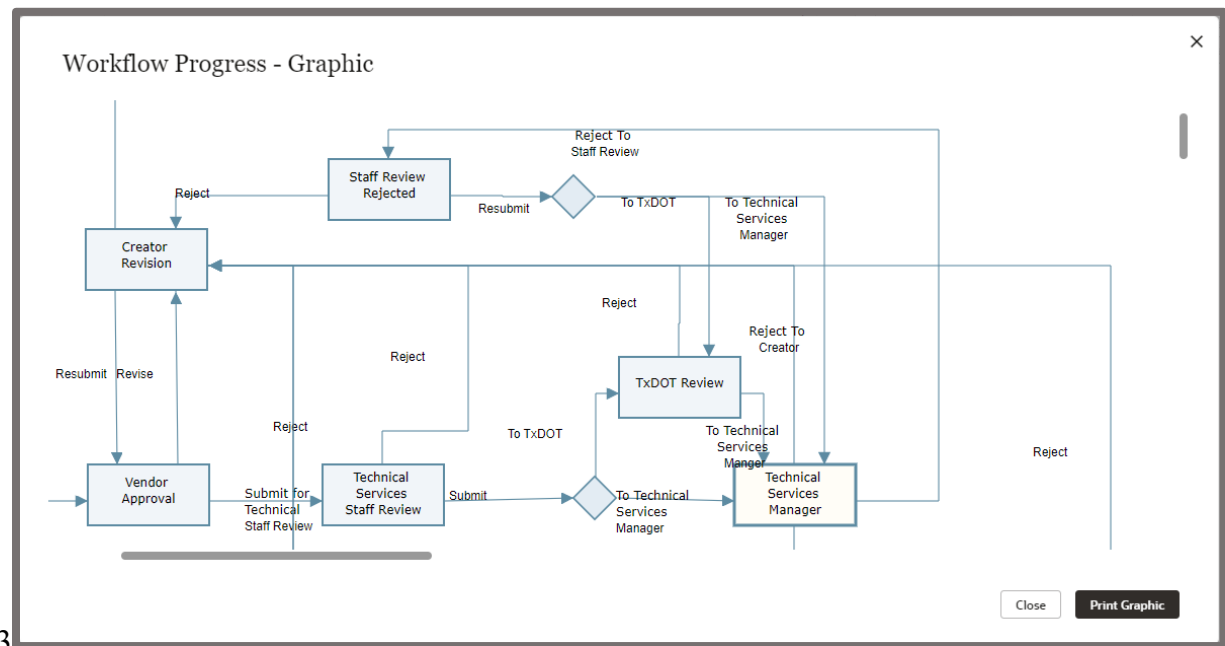
Figure 20 – Payment Request Status Continued

The screenshot shows the 'Payment Request' page with the 'Workflow Progress' tab selected. A red box highlights the 'View Graphic...' button. Another red box highlights the 'End' status in the 'Status' column of the workflow table, with a red arrow pointing to it and the text 'Scroll to see all the details of the Workflow'.

Title	Record Number	Current Step	BP Setup Used
Sample TOC	PR-0000002	End	PR - TO - Techni...

Step Name	Assignee	Company	Status
Creation	CHRIS PEREZ1	SAMPLE COMPANY	Completed
Vendor Approval	CHRIS PEREZ1	SAMPLE COMPANY	Closed
Creator Revision	CHRIS PEREZ1	SAMPLE COMPANY	Closed
Vendor Approval	CHRIS PEREZ1	SAMPLE COMPANY	Completed
Technical Service...	CHRIS PEREZ1	SAMPLE COMPANY	Completed
Creator Revision	CHRIS PEREZ1	SAMPLE COMPANY	Completed
End	Ashish Tripathi	HVJ South Centra...	View Only
End	ANTONIO AGUILAR	City of San Antonio	View Only
End	CHRIS PEREZ1	SAMPLE COMPANY	View Only
End	CRIS PEREZ	City of San Antonio	View Only
End	NAVELLA PEDRA...	City of San Antonio	View Only

Figure 21 – Workflow Progress – Graphic



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9. Select Audit Log to see who has approved or declined the item. See [Figure 22](#).

Figure 22 – Audit Log

The screenshot shows a web application interface for a 'Payment Request'. The top navigation bar includes tabs for 'Mail', 'Workflow Progress', 'Audit Log' (highlighted), and 'Referen'. The main content area is divided into two sections: 'General' and 'Invoice Summary'. The 'General' section contains fields for 'Project ID' and 'Project Name'. The 'Invoice Summary' section contains fields for 'Reference Commit' (4500000000-1), 'Period To' (01/20/2022), 'Date' (01/27/2022), 'Application No' (2), 'MSOS Total Amount' (0.00), 'Total Invoiced Amount' (275.00), 'Estimated Payment' (275.00), 'Retainage %' (0), 'Managing Department' (TCI CIP), and 'Final Estimate?' (No). The 'Audit Log' table on the right lists events with columns for Date, Event, and Action. The events include 'Workflow>Creator Revision', 'General Comments', 'Task Reassignment', 'Workflow>Technical Services...', 'Workflow>Vendor Approval', 'Workflow>Creator Revision', 'Workflow>Form', 'Workflow>Vendor Approval', 'Workflow>Form', 'Workflow>Form', 'Integration', and 'Workflow>Creation'. The total number of events is 14.

Date	Event	Action
02/10/2022 09:24 AM	Workflow>Creator Revision	Cancel
02/10/2022 09:24 AM	Workflow>Creator Revision	Cancel
02/10/2022 09:24 AM	General Comments	Text comment:
02/10/2022 09:24 AM	General Comments	Text comment:
02/10/2022 08:59 AM	Task Reassignment	Task has been
02/02/2022 01:46 PM	Workflow>Technical Services...	Reject
01/27/2022 12:55 PM	Workflow>Vendor Approval	Submit for Tec
01/27/2022 12:54 PM	Workflow>Creator Revision	Resubmit
01/27/2022 12:54 PM	Workflow>Form	Modify
01/27/2022 12:53 PM	Workflow>Vendor Approval	Revise
01/27/2022 12:53 PM	Workflow>Form	Modify
01/27/2022 12:53 PM	Workflow>Form	Modify
01/27/2022 12:52 PM	Integration	Modified by IN
01/27/2022 12:52 PM	Workflow>Creation	Submit For Ver

Total: 14

Schedule of Values – As of Last Completed Pay Request

The User defined report named “Schedule of Values – As of Last Completed Pay Request” can be used to view all the schedule of value line items for a project as of the last Payment Request. The report allows the user to select a specific contract type (construction, engineering, architecture, etc.) and the agency (City, SAWS Water, SAWS Sewer, etc.) to be included in the report. **If a payment request has not completed the workflow, amounts for that payment request will not be in the schedule of values.** You must go to the Payment Request to see those values.

Limitations of the report:

1. Following fields are not available: Specification Number (100.1, 100.2, etc.) and Unit of Measure (SF, SY, etc.)
2. The Unit Prices and Contract Quantities will reflect 0 until the item is partially or completed billed by the Vendor. The schedule of values (dollar amount) is shown.
3. The report only shows information in the current project. **It will not show information in other projects when the contract is used on multiple projects.**

To access the project:

1. Open the Contract/Project
2. Select the Reports tab on the left side of the screen
3. Select User-Defined
4. Select the Schedule of Values – As of Last Completed Pay Request report
5. A separate window will pop-up where filters can be set to run a report. The output runs best in pdf or csv (for excel) formats. It is recommended to select the PDF report format.

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- Adding parameters such as searching by a specific agency or PO Line allows users to filter through the results and view those that are more specific to users' needs.
- Parameters are not required to run the report.

Figure 23 – Schedule of Values – As of Last Completed Pay Request Report

ORACLE Primavera Unifier (Development)

CoSA Company Workspace Sample Project Sample Project TOC

Sample Project TOC - ...

Alerts uMail Collaboration Information Cost Manager Document Manager Logs

Close Task Order Invoice PO Line Payment Request Quote Request SOV Line Change Task Order OCC Change Order Reports User-Defined

User-Defined Reports

Create Actions View: All Reports

Name	Description	Data Type	Access Type	Report Type	Enable for integration	Owner
Expiring Technician Certifications	Provides a listing of Material ...	Material Test Technicia...	System	Tabular	No	CoSA Admin
Late Workflow Tasks	All tasks that are late at a step...	Workflow Information	System	Tabular	No	CoSA Admin
Material Test Reports Not Invoiced	Provides a list of the material ...	Material Test Log	System	Tabular	No	SAMUEL HUTC...
Material Test Reports Submitted	This report shows the reports...	Material Test Log	System	Tabular	No	CoSA Admin
Material Test Technicians	Shows which test reports that...	Material Test Technicians	System	Tabular	No	CoSA Admin
PO Line Items	Used for setting up excel invoice	PO Line	System	Tabular	No	CoSA Admin
Remaining Schedule of Values - As of Last Completed Pay Request	Best run in pdf or csv format.	Payment Request Sche...	System	Tabular	No	CoSA Admin
Remaining Summary Schedule of Values - As of Last Completed Pay Request	Best run in pdf. Note: Only t...	Payment Request Sche...	System	Tabular	No	CoSA Admin
Schedule of Values - As of Last Completed Pay Request	Best run in pdf or csv format	Payment Request Sch...	System	Tabular	No	CoSA Admin
SOV Line Change	Used to develop excel invoice...	SOV Line Change	System	Tabular	No	CoSA Admin
Task Order Status with Project	Provides the current status of...	Task Order Status	System	Tabular	No	SAMUEL HUTC...

Payment Request WebEx Video Guide

To access a Webex recording on Payment Requests, select the link below and enter the password PRIMELink1234 when prompted:

- Payment Request – How to Create a Payment Request:
<https://sanantonio.webex.com/ec3300/eventcenter/recording/recordAction.do?theAction=poprecord&siteurl=sanantonio&entapname=url3300&internalRecordTicket=4832534b0000000509baf75390d6cf73f74ad2b5112496a958225e2ef32450dd2244bb38d21ea8fb&renewticket=0&isurlact=true&format=short&rnd=6760987523&RCID=c6d0c49f0b0c4cb392de53186befeea2&rlD=329509922&needFilter=false&recordID=329509922&apiname=lsr.php&AT=pb&actapname=ec3300&SP=EC&entactname=%2FnbrRecordingURL.do&actname=%2Feventcenter%2Fframe%2Ffg.do>

APPROVING/REJECTING TASKS

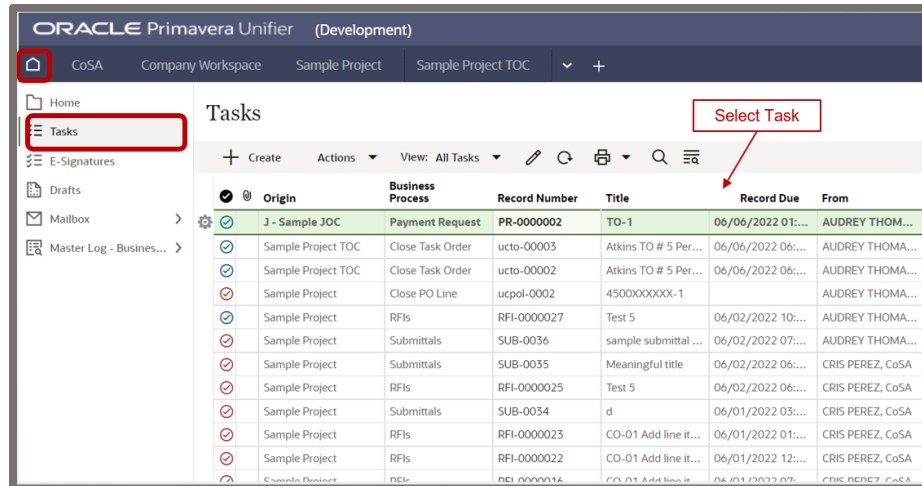
Vendor User Guide

Approving a Task

Tasks will appear in your Home Tab if you are a user assigned to the current workflow step that the business process is in.

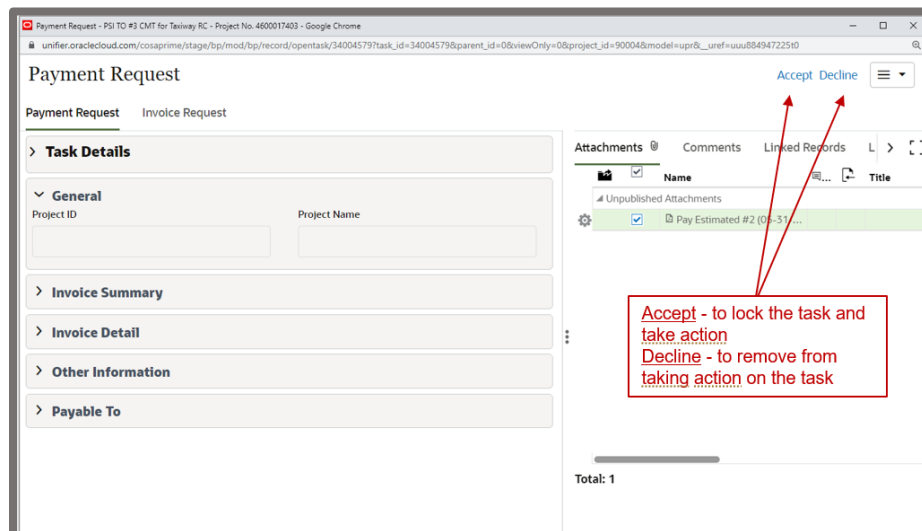
1. On the Home tab – Select Tasks
2. Double-click on a task on your list and review the item

Figure 1 – Task Location



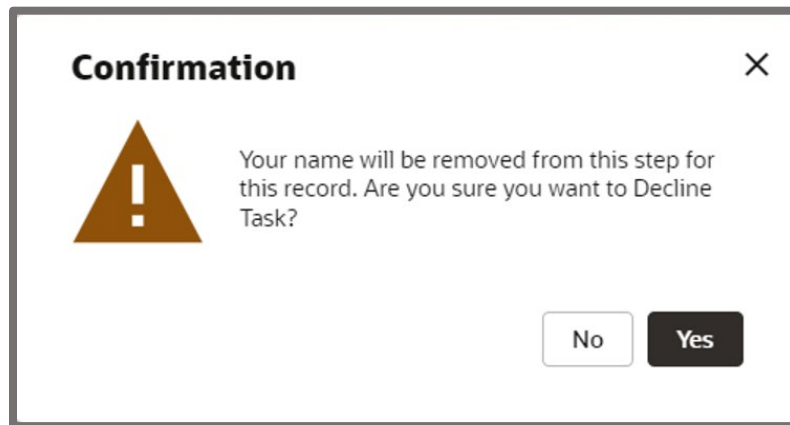
3. In the upper right corner, select “Accept or Decline”
 - a. Accepting a task **DOES NOT** mean the business process is approved. Accepting the task means the user is going to take action on the particular task.
 - b. Declining the task **DOES NOT** reject the business process but means you will remove yourself from taking action.
 - i. (If you Decline a task – you will receive a dialog box stating: Your name will be removed from this step for this record. Are you sure you want to Decline Task?
 - ii. Click Yes or No)

Figure 2 – Accepting/Declining a Task



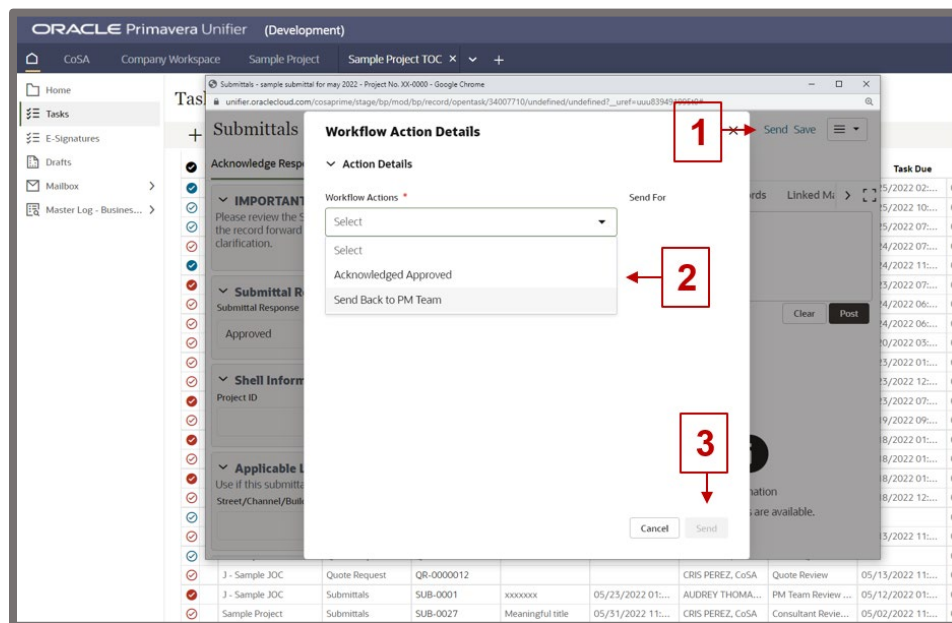
Vendor User Guide

Figure 3 – Declining a Task Alert



4. After reviewing the task, select Send on the upper right corner
5. You will have several options depending on the type of task you are reviewing. Select the option that will send the task to the next reviewer in the workflow or approved (if available) then select Send.

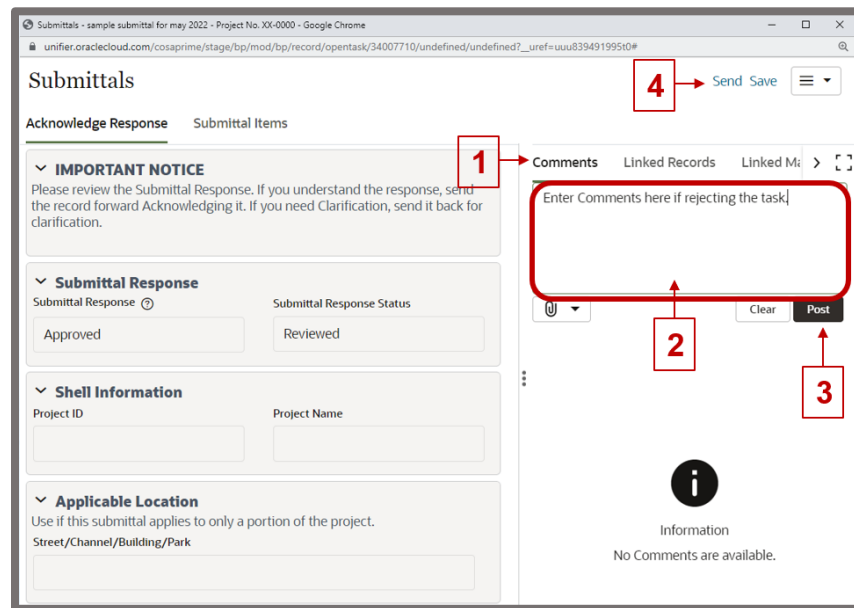
Figure 4 – Approving a Task



Rejecting a Task

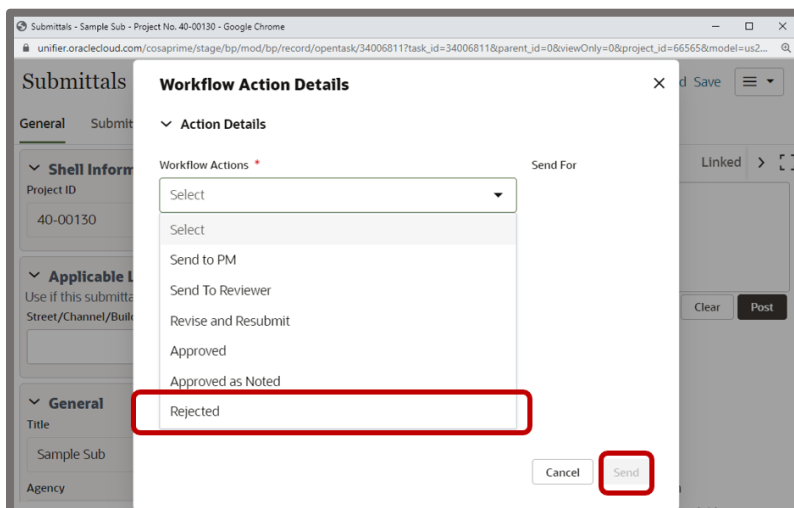
1. Accept the task to take action.
2. Review the task.
3. Select Comments and enter the reason you are rejecting the task
4. Attach any files if needed

Figure 5 – Adding Comments Before Rejecting



5. Depending on the business process, several options may display which may include:
 - a. Revise and Resubmit – sends back to the Creator for revision
 - b. Reject – Rejects the task
 - c. To Submitter Clarification – option available in the RFI BP
 - d. To Other Reviewer – defers review to another reviewer before approving or rejecting a task
6. Select the best option that fits the action you would like to take then select Send.

Figure 6 – Rejecting a Task



START A PROPOSAL REQUEST – NEGOTIATIONS (PRN) or FIELD WORK DIRECTIVE (PWD)

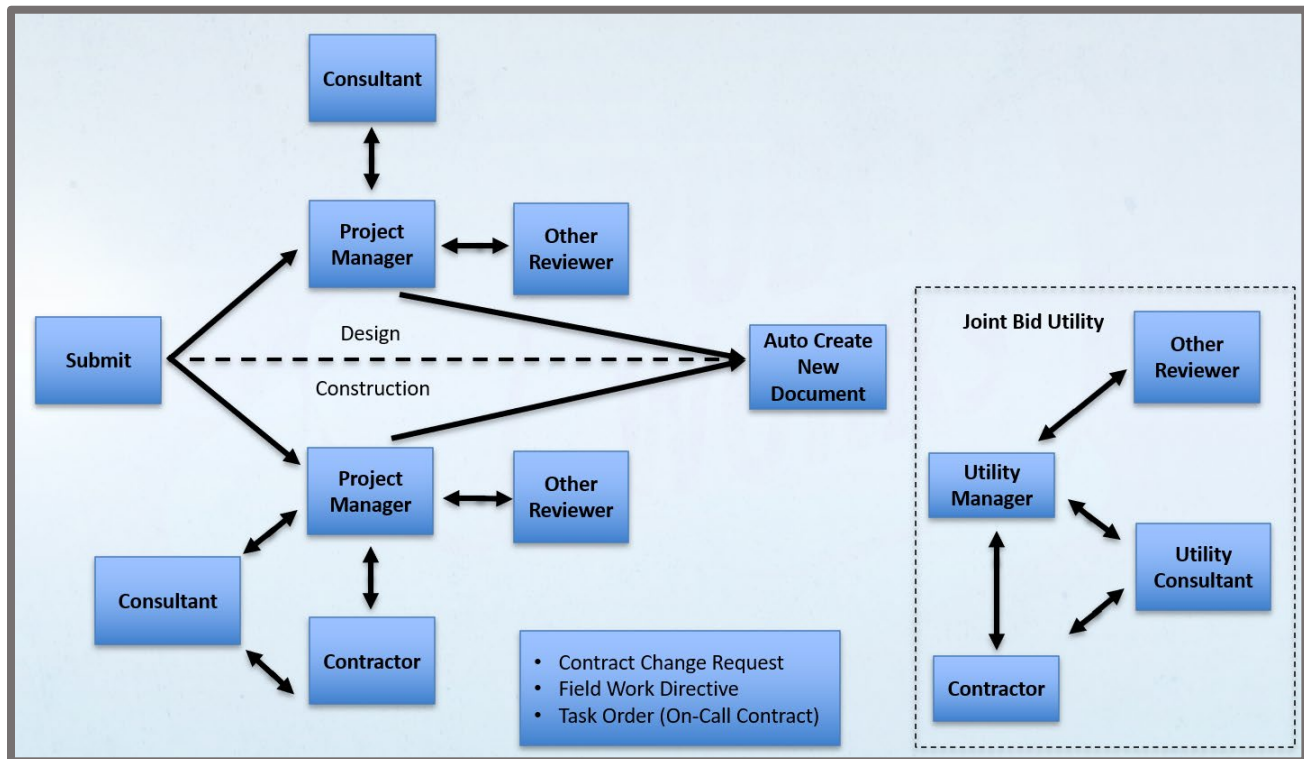
General

The Proposal Request and Negotiations (PRN) Business Process is used by the City to request proposals from vendors and for vendors to submit their proposals to the City. **(Change Orders and some Task Order will start at this level)**

Workflow

The workflow is shown in [Figure 1](#).

Figure 1 – PRN Workflow



PRN Business Process Location

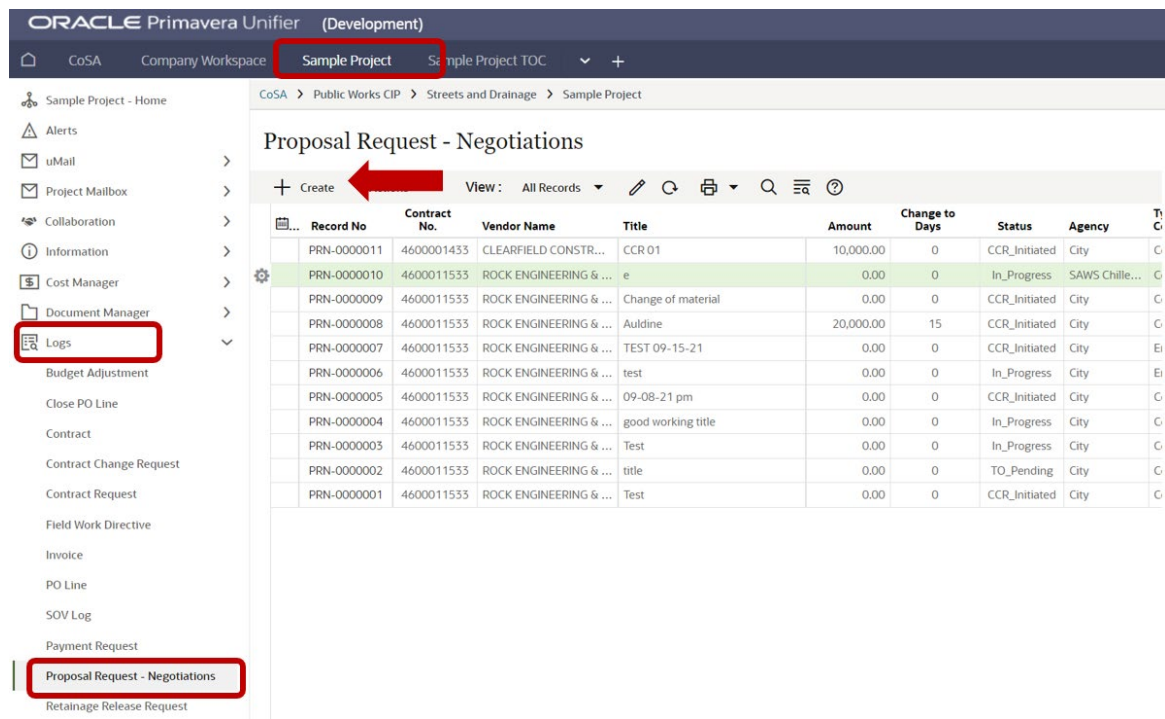
The Payment Request business process is located under the project in the Logs folder. See [Figure 2](#).

Creating a PRN

1. To create the PRN, go to Proposal Request – Negotiations located in the Logs folder under the project and click on Create. See [Figure 2](#).

Vendor User Guide

Figure 2 – PRN Location



2. The Header Form is displayed in [Figure 3](#). All fields marked with “*” are required. Select fields are highlighted below.

Figure 3 – PRN Header Form

Create New Proposal Request - Negotiations

Send Save

Proposal Request - Negotiations Comments Comments

Select Purchase Order

Select one of the Vendor's Purchase Order Lines. This will upload the Contract and Vendor's information.

Purchase Order Record No. *

Type a Record Number...

Required

Use picker to search for PO

General

Project Number

XX-0000

Project Name

Sample Project

Record Number

Status

Title *

SAP Contract No.

Required

Creator

AUDREY THOMAS

Creation Date

Type Contract *

Select

Required

Vendor Name

Agency *

Select

Submit To *

Select

Required

On-Call Contract?

Special Contract

Required

Selecting incorrect Agency may cause delays in approvals of a Contract Change Request

Team who will first receive the PRN

Total: 0

Vendor User Guide

- a. Purchase Order Record No. – Using the picker button, select the purchase order. This will upload the Vendor and contract information.
- b. Title – Input a meaningful title.
- c. Type of Contract – select from the list that is most appropriate to the PRN
- d. On-Call Contract – select Yes or No
- e. Agency – Select the proper agency – City, SAWS Water or Sewer, etc. **Selecting utility is critical in the PRN process. Not selecting the utility can delay the approval of the Contract Change Request.**
- f. Submit To – Select who to send the PRN first. The system will send it to the appropriate person based on the Agency and Submit To fields
- g. Change to Contract – Not required for initial submittal however if the Vendor is submitting a proposal it should be filled out. It is a required field for the Vendor for all future steps.
- h. Change to Calendar Days – Used for construction. Not required for initial submittal however if the Contractor is submitting a proposal it should be filled out. It is a required field for the Contractor for all future steps. Zero days are a valid entry.

Figure 4 – PRN Header Form Continued

Create New Proposal Request - Negotiations

Send Save

Proposal Request - Negotiations Comments Comments

On-Call Contract? Select

Contract Amount 0.00

Contract #

Change to Contract Cost 0.00

Contract Change Request

Special Contract

Previous Contract Changes 0.00

Contract Change Percentage 0

Change to Calendar Days 0

Field Work Directive Item

▼ Description of Change

Description of Change *

Justification for Proposed Change

▼ Ordinance Information

Change Order Council Threshold 0.00

▼ Vendor Information

Linked Records Linked Mail

Add

Direc... Type Business Process

Total: 0

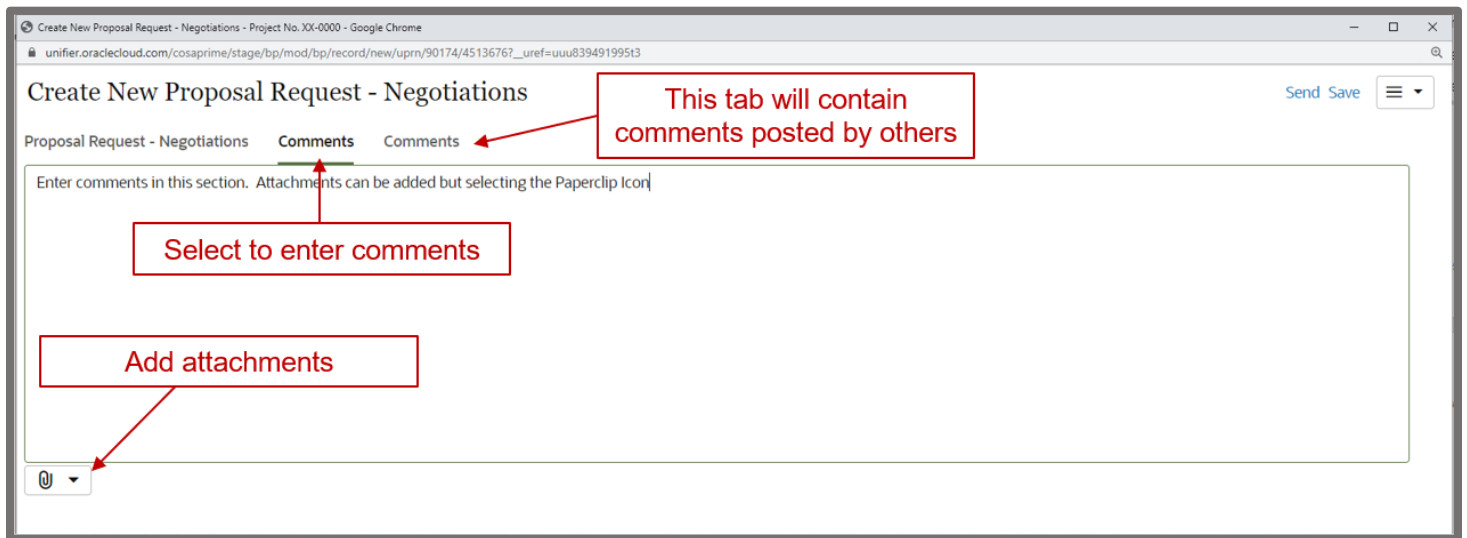
Enter request and details here

Enter why change is necessary

- i. Description of Change – Explain what is being requested.
 - j. Justification for Proposed Change – Explain why the requested action is required. This is not required but may be useful when the Contract Change Request is created.
3. To add a comment to the PRN, select the Comments tab in the center of the PRN Request as seen in [Figure 5](#).
- a. Attachments can be added to a comment by selecting the Paperclip icon.
 - b. Comments posted by others can be viewed in the Comments tab on the right side of the PRN Request.

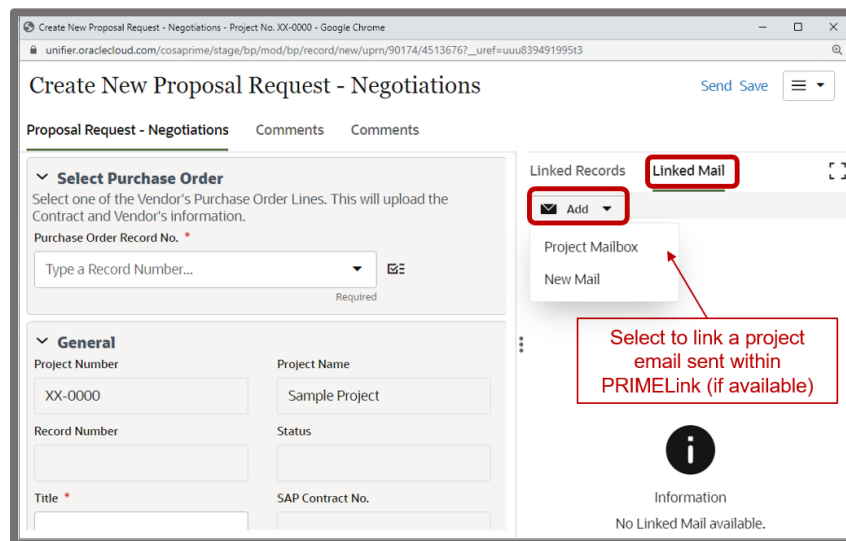
Vendor User Guide

Figure 5 – Comments



4. Click on Linked Emails to add Emails within the project.

Figure 6 – Linked Emails



5. To add a Linked Record that is Available within PRIMELink, select Linked Records then click Add. See [Figures 7a](#) and [7b](#).
 - a. Select the Record(s)
 - b. Using the arrows, push the appropriate record(s) to select the record(s) to attach to the PRN
 - c. Select done.

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Figure 7a – Linked Records

Create New Proposal Request - Negotiations

Send Save

Proposal Request - Negotiations Comments Comments

Select Purchase Order

Select one of the Vendor's Purchase Order Lines. This will upload the Contract and Vendor's information.

Purchase Order Record No. *

Type a Record Number...

Required

General

Project Number: XX-0000

Project Name: Sample Project

Record Number

Status

Title *

SAP Contract No.

Creator: AUDREY THOMAS

Creation Date

Linked Records

Add

Direc... Type Business Process

Total: 0

Select to add project records that are available within PRIMELink

Figure 7b – Linked Records

Add Records

Select Business process Action Items View: (Modified) All Records

Record No. Title Creator Priority Due Date

AI-0000001 test ANTONIO AGUILAR High 03/31/202...

Selected Records

Business Process Record Number Record Title

> Links Selected Record

>> Links All Records

< Removes Selected Record

<< Removes All Records

Total: 1 Total: 0

Cancel Done

Select from the list of Available Records

6. Once PRN has been completed, select Send
7. Select Submit in the Workflow Actions then select the black Send button
 - a. Additional Users may be copy furnished. These users will be able to view the PRN in the next workflow step. See [Figure 8](#).

Vendor User Guide

Figure 8 – Submitting the PRN

The screenshot shows a web browser window with the URL `unifier.oraclecloud.com/cosaprime/stage/bp/mod/bp/record/opendraft/2844831?_uref=uuu839491995t3#`. The main form is titled 'Create New Proposal Request'. A modal window titled 'Workflow Action Details' is open. In the modal, the 'Action Details' section shows 'Workflow Actions' with a dropdown menu set to 'Submit'. Below this, the 'Send For' field is 'Project Team Initial Const Accept', and the 'To' field lists 'ANTONIO AGUILAR;AUDREY THOMAS;CHRIS PEREZ1;CRIS PEREZ;SAMUEL...'. The 'CC' field lists 'ANTONIO AGUILAR', 'AUDREY THOMAS', 'CHRIS PEREZ1', 'CRIS PEREZ', 'SAMUEL HUTCHINS', 'Consultant Approver', 'Inspector Supervisors', and 'Inspectors'. The 'Due Date Details' section shows 'Task Due Date' as '05/26/2022 02:11 PM'. At the bottom of the modal, there are 'Cancel' and 'Send' buttons. The 'Send' button is highlighted with a red box. In the top right corner of the modal, there is a 'Send' button and a 'Save' button, both highlighted with red boxes.

Other Special Functions

1. **Changing Cost and Days.** On all workflow steps after creation only the Vendor can change the cost and day fields.
2. **Cancel PRN.** Only the Project Team can cancel a PRN.
3. **Other Reviewers Step.** Allows the Project Team to send the PRN to anyone on the project for review. The Other Reviewer can only send the PRN back to the person that sent it to them.
4. **Attachments.** All attachments and many of the fields will be copied over to the Contract Change Request and Field Work Directive when they are auto-created. The Project Team has the option to remove attachments from the Contract Change Request or Field Work Directive when they finalize them.
5. **Viewing Previous Comments.** You will not be able to see previous comments once you accept the task. Select the hyper link in the Action Details to see the previous comments.

Contract Change Requests (CCR) and Field Work Directives (FWD)

(Field Work Directive (FWD) in accordance with the construction contract allows the City, when unable to reach an agreement with the Contractor, to unilaterally direct the Contractor to do the work for a Not-to-Exceed amount. The Contractor must track time and materials to justify invoicing for this work.) The Contract Change Request or Field Work Directive (FWD) can only be started by the PM Team during the PRN approval process.

1. It is important to choose the correct Agency at the PRN. Not choosing the correct Agency may omit an Approver from reviewing which may cause future delays during the CCR or FWD process.
2. Project Team Accept – The Contract Change Order process will start.
3. Cancel PRN – Only the Project Team can cancel a PRN.
4. The Contract Change Request will autogenerate when the Project Team selects Project Team Accept in the Workflow Action steps during the PRN review process. [Figure 9](#) shows the CCR Record that was autogenerated.

Figure 9 – CCR Autogenerated

The screenshot shows a web browser window with the URL `unifier.oraclecloud.com/cosaprim/stage/bp/mod/bp/record/open/uprn/9298/0/0?srcid=9298&model=uprn&fromcostlog=1&project_id=90174&nfl=0&_uref=...`. The page title is 'Proposal Request - Negotiations'. The form is divided into two main sections: 'Construction' and 'ROCK ENGINEERING & TESTING'. The 'Construction' section contains the following fields: Agency (dropdown), City (dropdown), On-Call Contract? (radio button, No selected), Contract Amount (text input, 0.00), Contract # (text input), Change to Contract Cost (text input, 20,000.00), and Contract Change Request (text input, CCR-0000004). The 'ROCK ENGINEERING & TESTING' section contains the following fields: Submit To (dropdown, Consultant), Special Contract (radio button, No selected), Previous Contract Changes (text input, 0.00), Contract Change Percentage (text input, 0), Change to Calendar Days (text input, 15), and Field Work Directive Item (text input). A red arrow points from a text box to the 'Contract Change Request' field. The text box contains the text: 'Autogenerates when the PM Team selects Project Team Accept in the workflow actions.'

5. Initiate Field Work Directive – The Project Team will select Initiate Field Work Directive in the Workflow Action steps during the PRN review process. This will close the PRN process and autogenerate a Field Work Directive. can only be started by the Project Team when the PRN. [Figure 10](#) shows the FWD record that was autogenerated after the PM Team selected Initiate Field Work Directive.
6. When CCRs and FWDs are generated, the PRN is automatically closed.

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Figure 10 – FWD Autogenerated

Proposal Request - Negotiations

Contract # 4600001433

Contract Change Percentage 0.28

Change to Contract Cost 2,500.00

Change to Calendar Days 5

Contract Change Request

Field Work Directive Item FWD-0000001

Description of Change

change

Justification for Proposed Change

Autogenerates when the PM Team Initiates the FWD and the PRN closes.

7. If the FWD is issued – a Unifier Task email will be sent to the contractor for the contractor to acknowledge that is has received the FWD. The **“Contractor Acknowledgement”** step **does not** constitute agreement with the FWD nor does failure to process the document in PRIMELink relieve the Contractor from the responsibility to comply with the FWD. The Contractor’s failure to process the document in PRIMELink will prevent the FWD from being added to the Payment Request and the Contractor will not be able to submit any invoices for this work.
8. The Contractor will be required to enter the WBS Code and Item Short Description. Use the picker button to select the WBS Code. See [Figure 11](#).

Figure 11 – FWD Header Form

Field Work Directive

change

Justification for Proposed Change

change

Line Item Information

WBS Code 99-99-99-99-99

WBS Name SOV

Item Short Description Enter Short Description Here

Quantity 0

Unit Price 1.00

Amount 0.00

Contract Contingency

Source Name

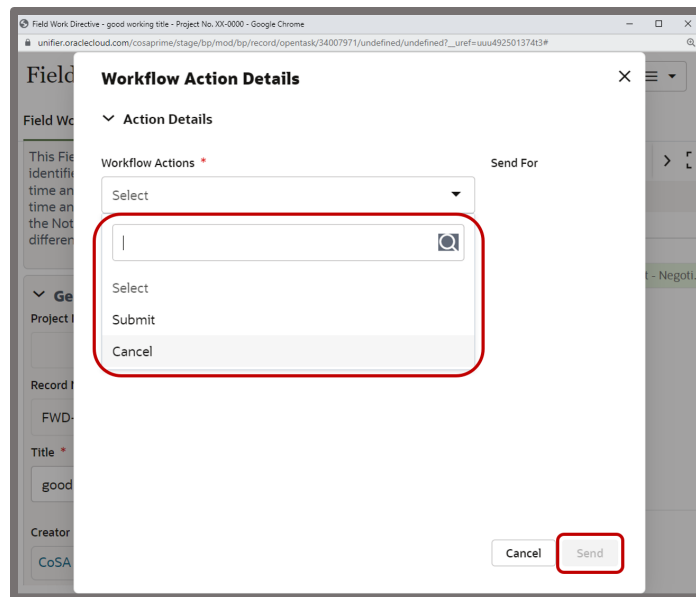
Amount Used 0.00

Must use picker.

Vendor User Guide

9. The contractor will have the option to either Submit or Cancel the FWD. See [Figure 12](#).

Figure 12 – FWD Workflow Actions - Contractor



10. If the Contractor approves the FWD, a Unifier Task email will be sent to the PRIMELink Helpdesk to add the FWD to the payment request.

REQUEST FOR INFORMATION (RFI)

General

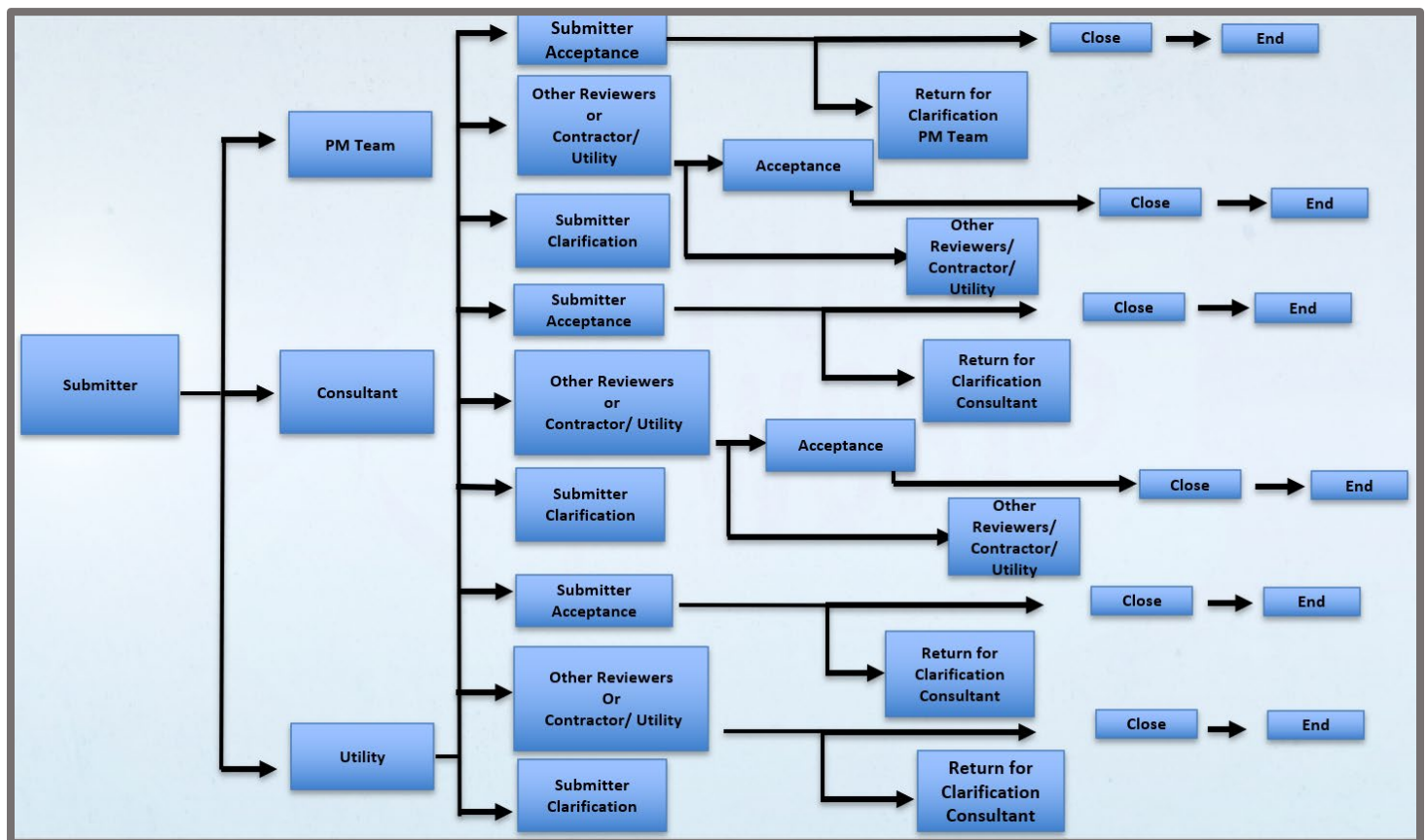
The Request for Information (RFI) business process allows the user to formally submit a question and obtain a response. COSA Project Managers may provide additional guidance for processing RFIs on their projects.

Workflow

The workflow is shown in [Figure 1](#). Highlights of the workflow are:

1. The Consultant or PM Team may Accept or request Submitter Clarification.
2. The Project Team and Consultant are automatically copied furnished on the initial RFI and closing of an RFI.
3. Contractor, Consultant, Project Team, Inspector or Joint Bid Utility can initiate an RFI.
4. The Creator selects who will initially receive the RFI (Consultant, Project Team, Contractor, and Joint Bid Utility).
5. An RFI can only be cancelled by the creator at the Submitter Clarification step.
6. Only the PM Team can change the Contract Change Required field. Selecting this option will not automatically initiate a Contract Change Request.

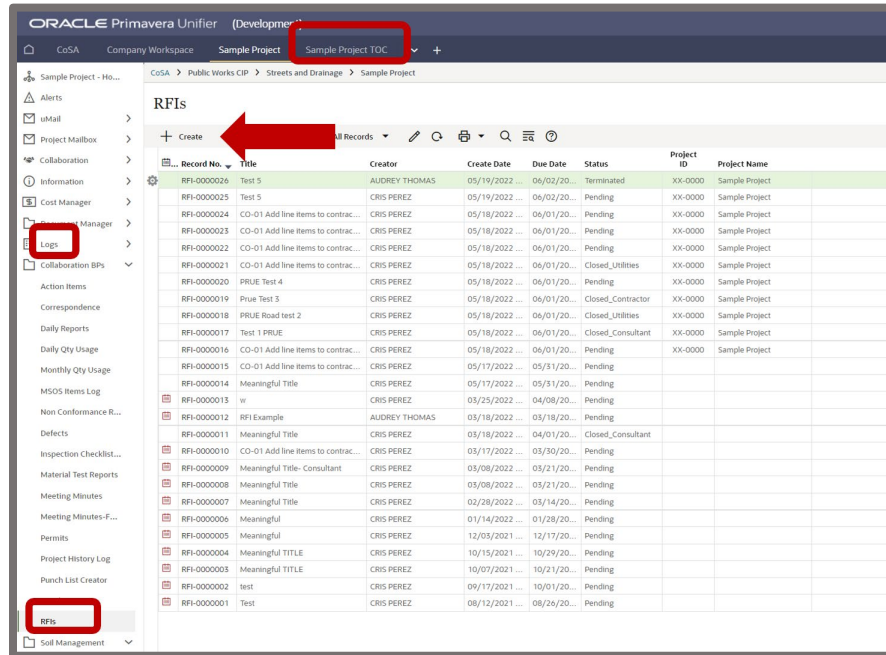
Figure 1 - RFI Workflow



RFI Business Process Location

The RFI business process is located under the project in the Collaboration BPs folder. See [Figure 2](#).

Figure 2 – RFI Business Process Location



Creating an RFI

1. To create the RFI, go to RFIs located in the Collaboration BPs folder under the project and click on Create. See [Figure 2](#)
2. The Header Form is displayed in [Figure 3](#). Select fields are highlighted below.
3. The title should describe the RFI question. The title is displayed in the email and used in filing the RFI in document manager. The title CANNOT be changed after creation.
4. Assign a priority level to the RFI: High, Medium, and Low.

Figure 3 – RFI Header Form

Create New RFIs

Creation Collaboration Response

Shell Information

Project ID: [] Project Name: []

Title: [] Creator: AUDREY THOMAS

Record Number: [] Creation Date: []

Due Date: 04/01/2022 11:51 AM

Disciplines: []

Reference ID: [] Priority Level: []

Action Requested

RFI Question: []

Total: 0

Vendor User Guide

5. Enter RFI Question. If applicable, a creator may enter a proposed solution. See [Figure 4](#).
6. All the editable fields on the form at creation can only be changed by the creator in the Submitter Clarification step.

Figure 4 – RFI Header Form Continued

Create New RFIs - Project No. XX-0000 - Google Chrome

unifiner.oraclecloud.com/cosaprim/stage/bp/mod/bp/record/new/ur1/90174/4513679?_uref=uuu748198636t2

Create New RFIs

Send Save

Creation Collaboration Response

RFI Question

Proposed Solution

Cost and Schedule Information

Cost Impact

Schedule Impact

Estimated Cost

Impact Day Type

Est. Schedule Impact (days)

Cost Impact Notes

Schedule Impact Notes

Enter RFI question

Enter fields if applicable

Linked Records

Linked Mail

Add

Dir... Type Business Process Record Number

Total: 0

7. Selecting the Collaboration tab allows Creators and Reviewers to add comments and attach files to the RFI as seen in [Figure 5](#).

Figure 5 – Collaboration Tab

Create New RFIs - Project No. XX-0000 - Google Chrome

unifiner.oraclecloud.com/cosaprim/stage/bp/mod/bp/record/new/ur1/90174/4513679?_uref=uuu748198636t2

Create New RFIs

Creation Collaboration Response

Test comment - Audrey T.

Comments/Discussion can be entered here

Attachments

Upload Files - Google Chrome

Browse...

File Name File Size Document Title Rev. No. Issue Date

To upload: browse or drag and drop documents here

Advanced Options

File Upload Options

Include reference files

Upload from My Computer

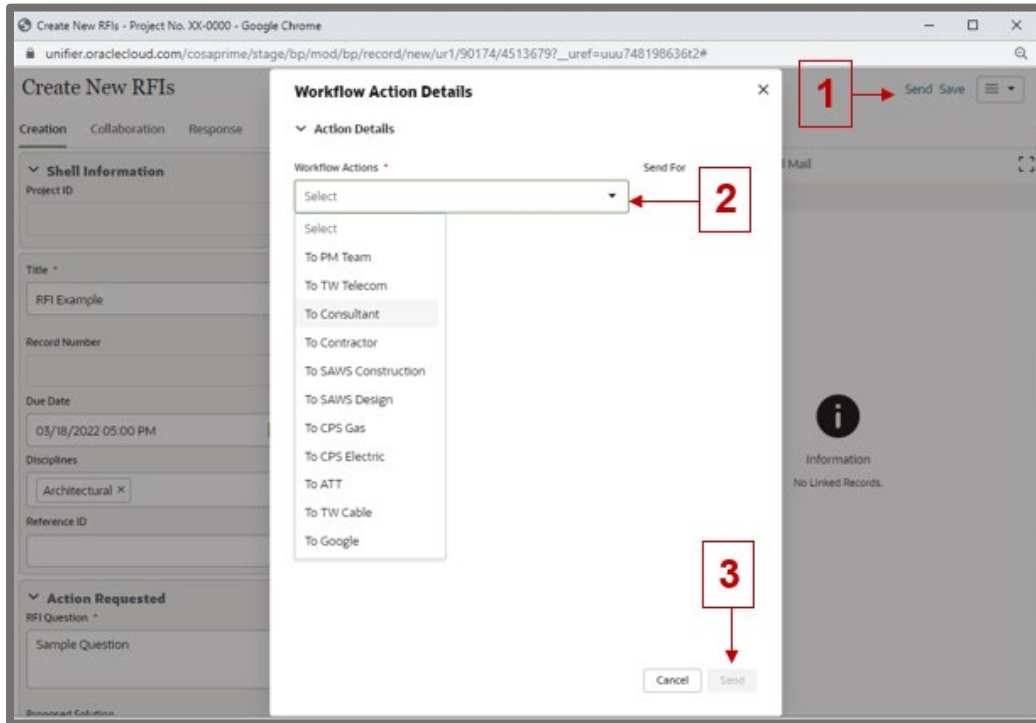
Revised automatically if file with same name exists

Cancel Upload

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- To submit the RFI, choose Send. The creator will have the option of choosing who will initially receive the RFI (Consultant, Project Team, Contractor, and Joint Bid Utility). Once the receiving team has been selected, Select Send. See [Figure 6](#).

Figure 6 – Send



Reviewing an RFI

- Locate and select the RFI that is pending review as seen in [Figure 7](#).

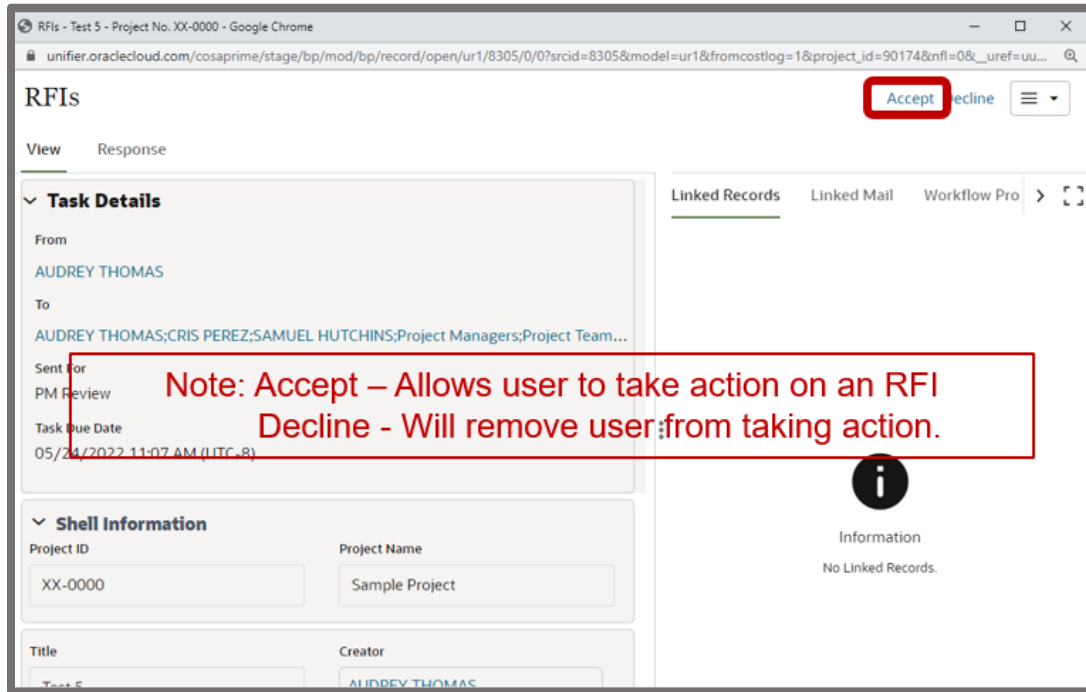
Figure 7 – Selecting RFI for Review

Record No.	Title	Creator	Create Date	Due Date	Status	Project ID	Project Name
RFI-000027	Test 5	AUDREY THOMAS	05/19/2022	06/02/20...	Pending	XX-0000	Sample Project
RFI-000026	Test 5	AUDREY THOMAS	05/19/2022	06/02/20...	Terminated	XX-0000	Sample Project
RFI-000025	Test 5	CRIS PEREZ	05/19/2022	06/02/20...	Pending	XX-0000	Sample Project
RFI-000024	CO-01 Add line items to contrac...	CRIS PEREZ	05/18/2022	06/01/20...	Pending	XX-0000	Sample Project
RFI-000023	CO-01 Add line items to contrac...	CRIS PEREZ	05/18/2022	06/01/20...	Pending	XX-0000	Sample Project
RFI-000022	CO-01 Add line items to contrac...	CRIS PEREZ	05/18/2022	06/01/20...	Pending	XX-0000	Sample Project
RFI-000021	CO-01 Add line items to contrac...	CRIS PEREZ	05/18/2022	06/01/20...	Closed_Uilities	XX-0000	Sample Project
RFI-000020	PRUE Test 4	CRIS PEREZ	05/18/2022	06/01/20...	Pending	XX-0000	Sample Project
RFI-000019	Prue Test 3	CRIS PEREZ	05/18/2022	06/01/20...	Closed_Contractor	XX-0000	Sample Project
RFI-000018	PRUE Road test 2	CRIS PEREZ	05/18/2022	06/01/20...	Closed_Uilities	XX-0000	Sample Project
RFI-000017	Test 1 PRUE	CRIS PEREZ	05/18/2022	06/01/20...	Closed_Constant	XX-0000	Sample Project
RFI-000016	CO-01 Add line items to contrac...	CRIS PEREZ	05/18/2022	06/01/20...	Pending	XX-0000	Sample Project
RFI-000015	CO-01 Add line items to contrac...	CRIS PEREZ	05/17/2022	05/31/20...	Pending		
RFI-000014	Meaningful Title	CRIS PEREZ	05/17/2022	05/31/20...	Pending		
RFI-000013	w	CRIS PEREZ	03/25/2022	04/08/20...	Pending		
RFI-000012	RFI Example	AUDREY THOMAS	03/18/2022	03/18/20...	Pending		
RFI-000011	Meaningful Title	CRIS PEREZ	03/18/2022	04/01/20...	Closed_Constant		
RFI-000010	CO-01 Add line items to contrac...	CRIS PEREZ	03/17/2022	03/30/20...	Pending		

Vendor User Guide

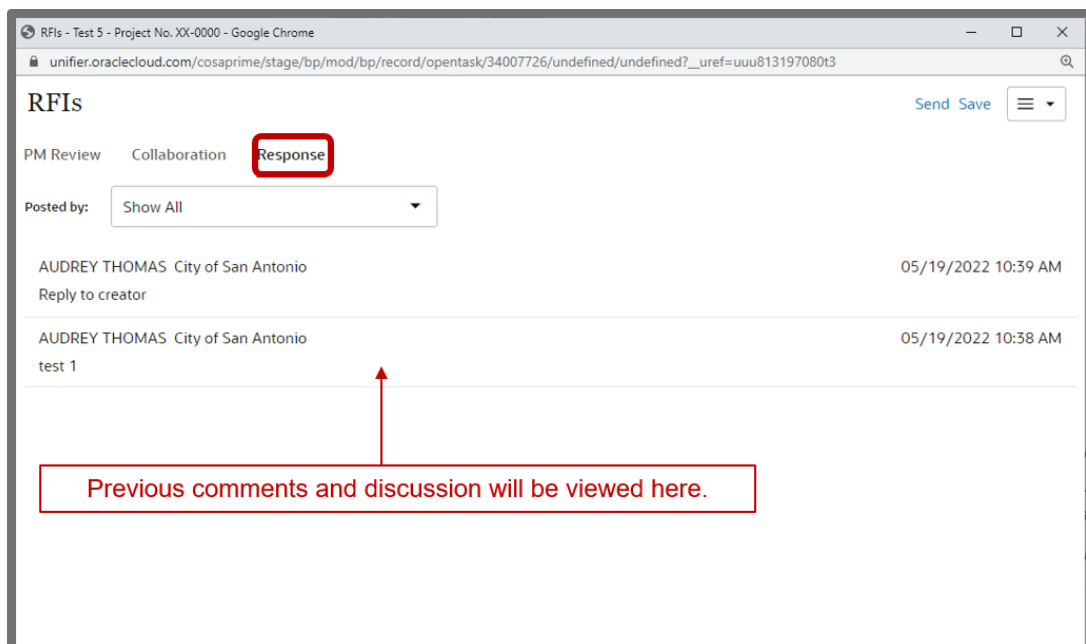
- You have the option to either Accept or Decline an RFI. Accepting will allow you to take action on the BP. Declining will not reject the RFI but will remove you from taking action or responding to the RFI. See [Figure 8](#).

Figure 8 – Accepting / Declining



- Reviewers will post comments as seen in [Figure 5](#). To view all the comments left by the RFI creator and previous reviewers, select the Response tab. See [Figure 9](#).

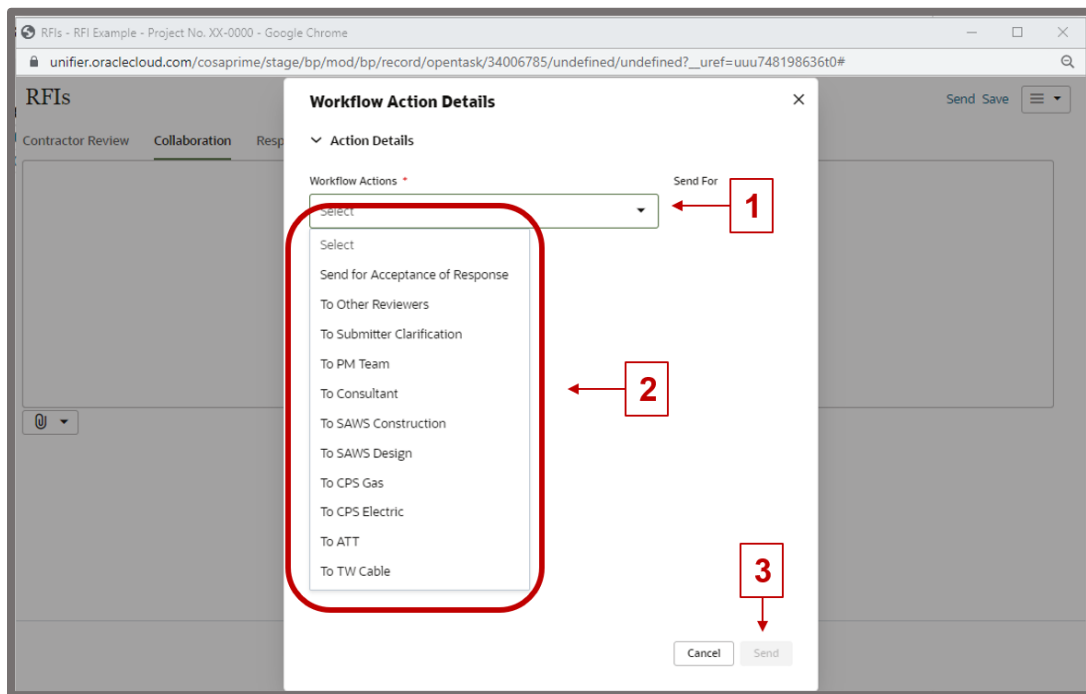
Figure 9 – Response



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4. Upon receipt of an RFI, the receiver has the following options:
 - a. Decline – Declining an RFI doesn't reject the request. By selecting the Decline option, a reviewer decides to not provide a response to the RFI in question. See [Figure 10](#).
 - b. Send for Acceptance of Response – This option sends your response to the Creator for their acceptance of the response. If they believe your response did not address the question, they can send the RFI back to you
 - c. To Other Reviewers – This option allows you to pick anyone on the project to review the RFI. The RFI will come back to you.
 - d. To Submitter Clarification – This option sends it back to the creator for clarification. The RFI will come back to you.
 - e. To PM Team
 - f. To Consultant
 - g. To Contractor
 - h. To Joint Bid Utility – Utility Companies are listed by name.

Figure 10 – Response



RFI WebEx Video Guide

To access a WebEx recording on RFIs, select from the links below and enter the password PRIMELink1234 when prompted:

- RFI – How to Create an RFI:
<https://sanantonio.webex.com/recording/service/sites/sanantonio/recording/playback/75607b72be86103a9ba12adc0fa33bf4>
- RFI – Advanced: In-Depth Look into the Review Process:
<https://sanantonio.webex.com/recording/service/sites/sanantonio/recording/playback/0bc180f2be8b103aa8f70a43bd096480>

SUBMITTALS

General

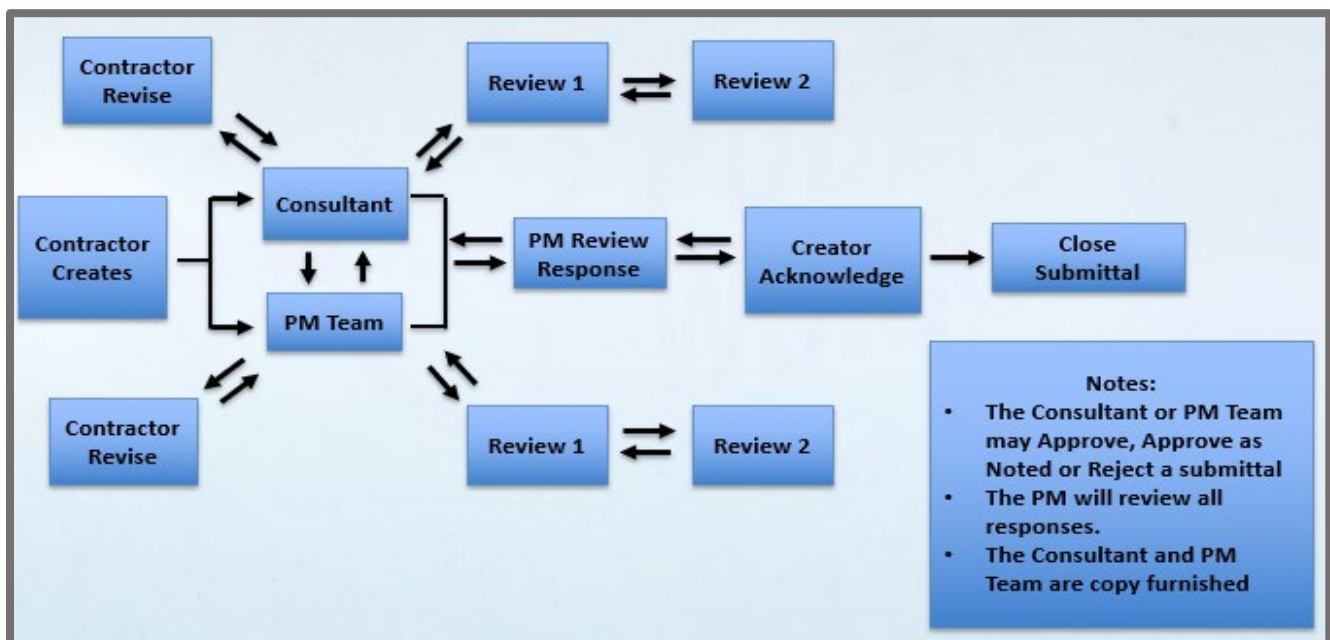
The Submittals business process is used primarily for the Contractor to submit required submittal documents for review and approval. To assist project teams, inspectors, etc. to identify Mix Designs and Job Mix Formulas (JMFs); **each Mix Design and JMF must be submitted on a separate submittal**. The PM must review all submittal responses prior to them going back to the contractor.

Workflow

The workflow is shown in [Figure 1](#). Highlights of the workflow are:

1. All steps are single approval. Only one person assigned to the step has to take action for the form to move forward.
2. Both the Consultant and PM Team are copy furnished if they did not receive it for action when it was initially submitted. They are not copied furnished again until the Creator Acknowledge step.
3. The Reviewers can be anyone who has access to the project in PRIMELink. The sender must pick the name of the person when sending the submittal to a reviewer.
4. Reviewers can forward the submittal to another reviewer. The submittal will go back to the Consultant or PM Team member that sent it for review when the Reviewers are done with it.
5. If the Consultant or PM sends the submittal for revision, it will go back to the Consultant or PM Team member that sent the submittal for Revision.
6. Only the Consultant or PM Team can mark an individual document or the entire Submittal as Approved, Approved as Noted or Rejected. Reviewers submit your remarks in the Comments tab.
7. The PM or PM Team Approvers will review all responses prior to sending them to the Contractor. Based on their review, they can send it to the Contractor or back to the preparer to be revised.
8. The Creator Acknowledge step is where the creator acknowledges receipt. The person at this step has two options: (1) Acknowledge the response and close out the submittal or (2) Return the record to the person who prepared the response for clarification. The Consultant Approver, PM Team and Contractor Approver are copy furnished at this step.

Figure 1 - Submittal Generic Workflow



Submittal Business Process Location

The Submittal business process is located under the project in the Logs folder. See [Figure 2](#).

Creating a Submittal

2. To create the Submittal, go to the Submittals tab located in the Logs folder under the project and click on Create. See [Figure 2](#).

Figure 2 - Creating a new Submittal

Record No.	Title	Agency	Creator	Reference ID	Create Date	Due Date	Status	Drawing No.	Specification Section	Street/Channel/Bu...	Mix Design...
SUB-0025	Sample Submittal 52822.1	City	AUDREY THOMAS		05/28/202...	04/11/20...	At_PM_Review				Yes
SUB-0024	Sample Submittal 52822	City	AUDREY THOMAS		05/28/202...	04/11/20...	At_Consultant	5.02			Yes
SUB-0023	Meaningful title	City	CRIS PEREZ		05/25/202...	04/08/20...	At_PM_Review				No
SUB-0022	Sample Sub	City	AUDREY THOMAS		05/21/202...	04/04/20...	At_Consultant				No
SUB-0021	ESA - Submittal	City	CRIS PEREZ		05/18/202...	04/01/20...	Approved				No
SUB-0020	TCI-01 Project Control Sheet	City	CRIS PEREZ		05/18/202...	04/01/20...	Approved_As_Noted				No
SUB-0019	Meaningful title	City	CRIS PEREZ		05/18/202...	04/01/20...	Approved_As_Noted				No
SUB-0018	Meaningful title	City	CRIS PEREZ		05/18/202...	04/01/20...	At_Response_Accept				No
SUB-0017	Meaningful title	City	CRIS PEREZ		05/18/202...	04/01/20...	At_Consultant				No
SUB-0016	Meaningful title	City	CRIS PEREZ		05/09/202...	05/22/20...	At_Response_Accept				No
SUB-0015	Meaningful title	City	CRIS PEREZ		05/09/202...	05/22/20...	At_PM				No
SUB-0014	Meaningful title	SAWS Water	CRIS PEREZ		05/04/202...	05/18/20...	At_Reviewer				No
SUB-0013	Meaningful title	SAWS Water	CRIS PEREZ		05/02/202...	05/16/20...	Approved_As_Noted				No
SUB-0012	Meaningful title	SAWS Water	CRIS PEREZ		05/02/202...	05/16/20...	At_Response_Accept				No
SUB-0011	Meaningful title	City	CRIS PEREZ		02/28/202...	05/14/20...	At_PM				No
SUB-0010	Meaningful Title	City	CRIS PEREZ		02/28/202...	05/14/20...	Approved_As_Noted				No
SUB-0009	HVAC Specs	City	CRIS PEREZ		02/04/202...	02/11/20...	At_Response_Accept				Yes
SUB-0008	542 Topeka Driveway Reconstruct	SAWS Sewer	CRIS PEREZ		01/14/202...	01/28/20...	At_Response_Accept				No
SUB-0007	Test 1	SAWS Sewer	CRIS PEREZ		11/09/202...	11/23/20...	At_Consultant				No
SUB-0006	Auldine	City	CRIS PEREZ		10/15/202...	10/29/20...	At_Consultant				Yes
SUB-0005	Hydomulch	City	Nicole Hutchins		09/17/202...	10/01/20...	Approved				No
SUB-0004	Test 1	City	CRIS PEREZ		09/17/202...	10/01/20...	At_Response_Accept				No
SUB-0003	Test	City	CRIS PEREZ		09/15/202...	09/29/20...	At_PM				No
SUB-0002	Test Submittal	City	SAMUEL HUTCHINS		08/13/202...	08/27/20...	At_Response_Accept				No
SUB-0001	Test_Column Specs	City	CRIS PEREZ	Submittal #2...	07/21/202...	08/04/20...	Approve				No

3. The Header Form is displayed in [Figure 3](#). Select fields are highlighted below.
 - a. Street/channel/Building/Park – If the submittal applies to only a portion of the project, identify the portion it applies to. For example, on Street Maintenance On-Call projects where there are many streets.
 - b. Title – Enter a title that provides the viewer information about the submittal. It cannot be changed after the submittal is sent forward.
 - c. Agency – Identify the agency that the work is related to. This will help Joint Bid agencies find the submittals related to their work.
 - d. Due Date – This is the date when you would like to receive approval of the submittal and is automatically set to ten working days. You can change it by clicking on the calendar next to the field. Setting this date does not necessarily mean that you will get a response when you want it.
 - e. Mix Design/JMF – This field is used to identify whether this submittal is for a Mix Design or JMF. It is a required field. If the answer is yes, the other three fields in this section will become required, otherwise they are unavailable. **Only one mix design or JMF can be submitted per submittal.**
 - f. The documents are stored in the Submittal Items tab. You can create a folder structure for the documents if necessary. You do not need to do this and should only do this if it is necessary for the reviewer to understand the documents.

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Figure 3 - Submittals Header Form

The screenshot shows the 'Create New Submittals' form. It has two tabs: 'Submittal Creation' (active) and 'Submittal Items'. The form contains several sections and fields:

- Applicable Location:** A text field for 'Street/Channel/Building/Park'. A red callout box says: "Enter if submittal applies to a portion of the project".
- Title:** A required text field. A red callout box says: "Cannot be changed once created".
- Agency:** A required dropdown menu.
- Due Date:** A date field showing '03/09/2022 11:20 AM'. A red callout box says: "Default date set to 10 working days".
- Reference ID:** A text field.
- Drawing No.:** A text field.
- Specification Section:** A text field.
- Mix Design/JMF Information:** A section with a note: "Only ONE Mix Design/JMF can be submitted per submittal." It includes:
 - Mix Design/JMF:** A required dropdown menu. A red callout box says: "Only one Mix Design/JMF can be submitted per submittal".
 - Material Type:** A required dropdown menu. A red callout box says: "Enter material type if Submittal is a Mix Design/JMF".
 - Class/Type:** A dropdown menu.
 - Mix/JMF Number/Name:** A text field.
 - Description:** A large text area.
- Comments:** A section on the right with tabs for 'Comments', 'Linked Records', and 'Linked Mail'. It has a 'Post' button and a note: "General comments and attachments (for multiple items/attachments, use the Submittal tab)".

- g. Click on the Submittal Items tab located in the upper left-hand corner next to the blue Submittal Creation tab. To add documents to the submittal form, click on the Add button. See [Figure 4a](#). You can add a folder or a line item which is an attachment. See [Figure 4b](#) for adding a Folder. If you select the line item option, the line item detail form will open on the right side of the window.
- h. The Detailed Form is shown in [Figure 4a](#).
 - i. Name – To attach a document click on the paper clip button to the right of the field. You can only add one document at a time. The Name field will automatically be updated to the name of the file. If you are not attaching a document, type in the name of the document.
 - ii. Fill out the remainder of the fields as appropriate and click OK. You will have to add the documents one at a time.
 - iii. Only the Consultant or Project Team may change the Line Item Status field.
 - iv. Click Save to save your work or Save & Add New to add another document.

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Figure 4a - Submittal Detail Form – Adding a Line Item

Create New Submittals - Project No. XX-0000 - Google Chrome

unifier.oraclecloud.com/cosaprime/stage/bp/mod/bp/record/new/us2/90174/4513904?__uref=uuu753560647t2#

Create New Submittals

Submittal Creation Submittal Items **1**

Add Actions View Comments by: All

Folder Line Item **2**

Doc Type Variation From Contract Line Item Status Sent Via Date Received Date Sent

Note: One document per line item may be attached

Line Item Details

Name **3**

Sent Via Select

Doc Type Select

☐ Variation From Contract Documents **4**

Variation From Contract Documents Description

Line Item Status Submitted

Non-PRIMELink Submissions

Date Sent MM/DD/YYYY HH:MM AM

Date Received MM/DD/YYYY HH:MM AM **5**

Cancel Save Save & Add New

Figure 4b - Submittal Detail Form – Adding a Folder

Create New Submittals - Project No. XX-0000 - Google Chrome

unifier.oraclecloud.com/cosaprime/stage/bp/mod/bp/record/new/us2/90174/4513904?__uref=uuu753560647t2#

Create New Submittals

Submittal Creation Submittal Items **1**

Add Actions View Comments by: All

Folder Line Item **2**

Doc Type Variation From Contract Line Item Status Sent Via Date Received Date Sent

Note: Adding folders are not required but may help organize the line items

Folder Details

Name **3**

Folder Path

Cancel Save **4** Save & Add New

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- i. After you finish preparing the Submittal, click on Send in the upper right-hand corner. You will have the option to select either the Consultant or Project Manager to send it to. Send the submittal to the Consultant unless the Project Manager has requested that you send it to them first. See [Figure 5](#).

Figure 5 – Send for Consultant/PM Approval

Workflow Action Details

Workflow Actions *

Select

Select

Send to Consultant

Send to PM

Send For

Cancel Send

Note: Always send to Consultant unless otherwise noted

3 → Send Save

Reviewing a Submittal

1. Locate and select the submittal that is pending review as seen in [Figure 6](#).

Figure 6 – Selecting Submittal for Review

Record No.	Title	Agency	Creator	Reference ID	Create Date	Due Date	Status
SUB-0007	Sample Submittal 32822.1	City	AUDREY THOMAS		03/28/202...	04/11/20...	Pending
SUB-0006	Submittal #7 - Additional Parkin...		Sherrie Arnold		06/25/201...		Approved_As_N
SUB-0005	#6 - Landscaping		Sherrie Arnold		05/29/201...		Approved
SUB-0004	Submittal #5 - Asphalt		Sherrie Arnold		05/13/201...		Approved
SUB-0003	Striping & Signage		Sherrie Arnold		05/07/201...		Approved
SUB-0002	Submittal #3 - Plumbing		Sherrie Arnold		04/23/201...		Approved
SUB-0001	Submittal #2 - Cement		Sherrie Arnold		04/17/201...		Approved

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- You have the option to either Accept or Decline a submittal. Accepting will allow you to take action on the BP. Declining will not reject the submittal but will remove you from taking action or responding to the submittal. See [Figure 7](#).

Figure 7 – Accepting / Declining

The screenshot shows a web browser window titled 'Submittals - Sample Submittal 32822.1 - Project No. XX-0000 - Google Chrome'. The URL is 'unifier.oraclecloud.com/cosaprime/stage/bp/mod/bp/record/open/us2/10271/0/0?srcid=10271&model=us2&fromcostlog=1&project_id=90174&nfl=0&_uref=uuu864493337t2'. The page has a header with 'Submittals' and buttons for 'Accept' (highlighted with a red box) and 'Decline'. Below the header, there are tabs for 'Consultant/PM Review' and 'Submittal Items'. The 'Task Details' section is expanded, showing 'From: AUDREY THOMAS', 'To: ANTONIO AGUILAR;AUDREY THOMAS;CRIS PEREZ;SAMUEL HUTCHINS;Consultant Approver', 'CC: AUDREY THOMAS;CRIS PEREZ;SAMUEL HUTCHINS;Inspector Supervisors;Inspectors;Project...', 'Sent For: Consultant Review Initial', and 'Task Due Date: 03/31/2022 06:47 AM (UTC-8)'. A red callout box with white text says: 'Note: Accept – Allows user to take action on a Submittal' and 'Decline – Will remove user from taking action.' Below the task details, there is an 'IMPORTANT NOTICE' section with instructions on how to send the submittal for review. On the right side, there are tabs for 'Comments', 'Linked Records', 'Linked Mail', and 'Workflow P'. The 'Comments' tab is active, showing a text input field, a 'Clear' button, and a 'Post' button. At the bottom right, there is an information icon and the text 'No Comments are available.'

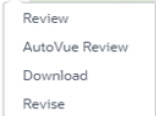
- To Review a document in the Line Item section, double click on the document. This will open the detailed form. There you can click on the document to open it.
- Only the Consultant and PM Team have the ability to change the document status (Line Item Status) to Approved, Approved as Noted or Rejected. To change the status, you must go to the detailed form for each individual document.

6



5. Reviewers may also add Line Items for other reviewers to view and review. To add a line item, follow Steps 1-2 of [Creating a Submittal](#).
6. To add comments to an attachment, double click the document in the Line Item section or select the Attachments tab as seen in [Figure 9](#). A gear icon will display next to the attachment. Select the gear and choose Review.

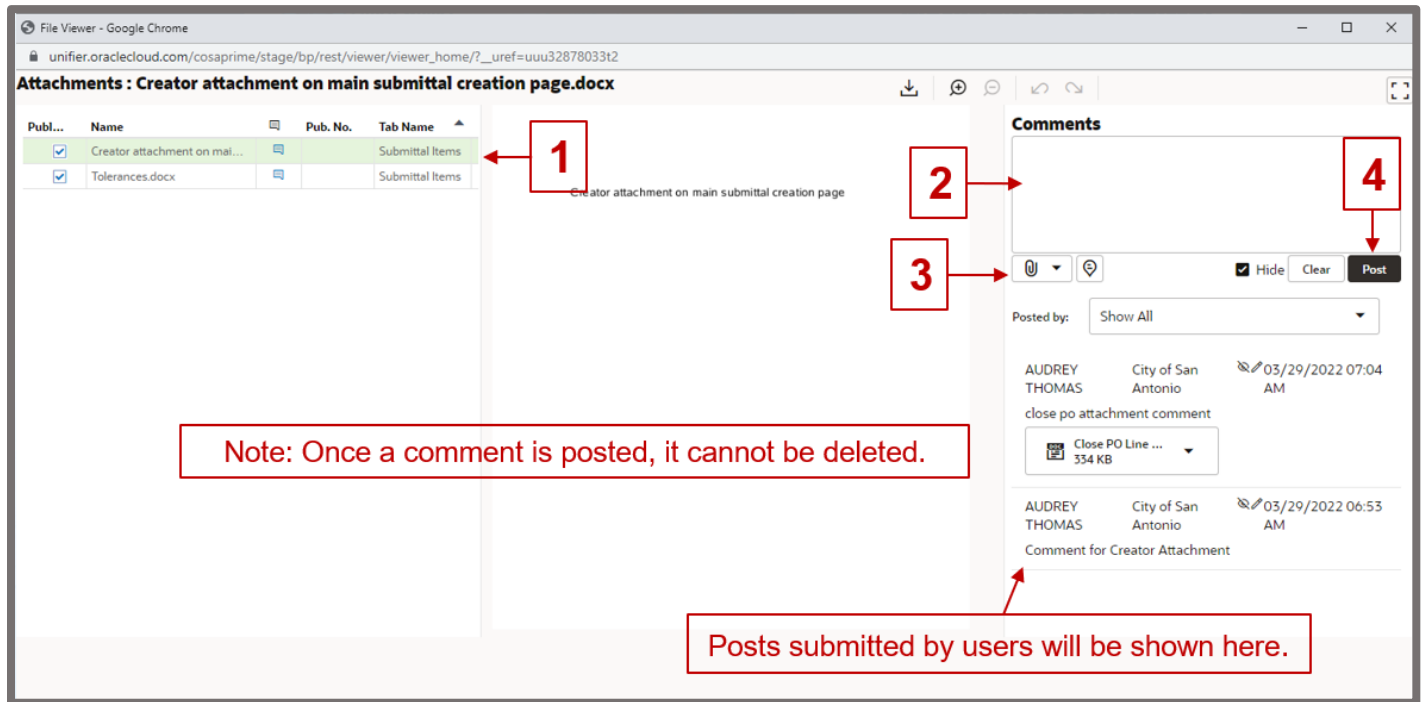
• • • • •



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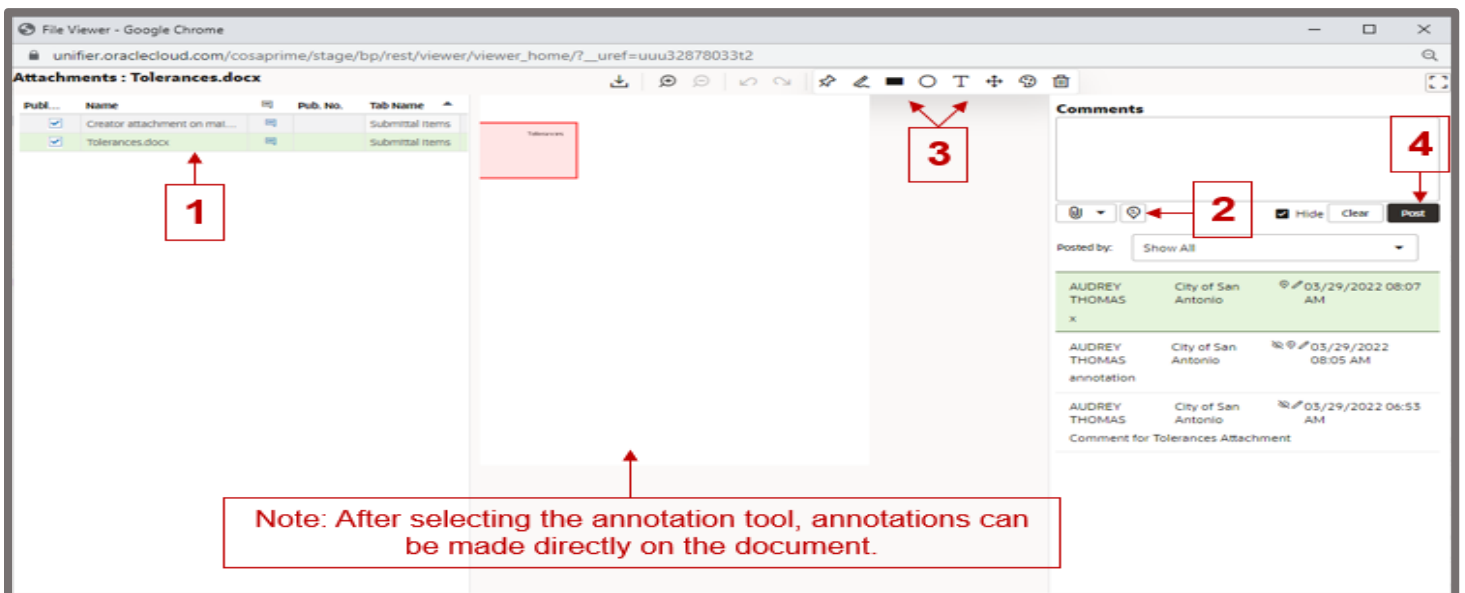
- A new window will display with the attachments listed. On this window you may post a comment. Select the attachment you wish to comment on and enter your comment into the Comments box. An attachment may also be posted along with a comment by selecting the paperclip icon as seen in See [Figure 10](#). Select Post once you are ready to submit a comment/attachment. Once a comment has been posted, the comment CANNOT be deleted.

Figure 10 – Posting a Comment



- You may also add annotations in the preview pane using the annotations tools. By selecting a tool, you can select text and markup a document. If you want to save an annotation, add a comment then select Post. Once posted, you will be able to see your annotations under that posting. See [Figure 11](#).

Figure 11 - Annotations



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9. Once the Consultant or PM Team are ready to close out the submittal, they must send it through the PM for review. Prior to sending to the PM for review you must select:
- Approved – Reviewer approves the submittal as is;
 - Approved As Noted – Reviewer approves a submittal but has provided some remarks on the matter;
 - Rejected – Reviewer rejects the creator's submittal;
 - Response Missing – Gives the ability for subsequent reviewers to require previous approvers to enter a response.

Figure 12 – Submittal Response

The screenshot shows the 'Submittals' form in a web browser. The 'Submittal Response' dropdown menu is open, showing options: 'Select', 'Approved', 'Approved As Noted', 'Rejected', and 'Response Missing'. The 'Response Missing' option is highlighted. The form also includes fields for 'Submittal Response Status', 'Project Name', and 'Street/Channel/Building/Park'. A table on the right shows the workflow steps: 'Creation' (Completed), 'Consultant Review' (Locked), 'Consultant Review' (In Progress), 'Consultant Review' (Locked), and 'Consultant Review' (Locked).

Step Name	Assignee	Company	Status
Creation	AUDREY THOMAS	City of San Antonio	Completed
Consultant Review...	SAMUEL HUTCHI...	City of San Antonio	Locked
Consultant Review...	AUDREY THOMAS	City of San Antonio	In Progress
Consultant Review...	CRIS PEREZ	City of San Antonio	Locked
Consultant Review...	ANTONIO AGUILAR	City of San Antonio	Locked

10. The Consultant has a choice to send the submittal to "Send to PM Response Review" or "Send to PM". Use the first option when you are ready to close out the submittal and want to send it to the PM to review. Use the second option when you are need the PM's input in preparing a response.

Figure 13 – Workflow Action Details

The screenshot shows the 'Workflow Action Details' dialog box. The 'Action Details' section is open, showing a dropdown menu with options: 'Select', 'Send to PM Response Review', 'Send to PM', 'Send To Reviewer', and 'Revise and Resubmit'. The 'Send to PM Response Review' option is highlighted. The dialog also includes 'Cancel' and 'Send' buttons. The background shows the 'Submittals' form with the 'Submittal Response' dropdown menu open.

PM Response Review

1. The PM or a member of their team is responsible for reviewing all responses prior to them being sent to the Contractor. This includes if the response was prepared by the PM team.
2. After reviewing the submittal and response the PM will select Reviewed or Revise in the Submittal Response Status block. If the Submittal Response is not filled out the PM must fill it out or send it back. There is an option to select Response Missing if the PM wants the Consultant to fill out the response. Choose Reviewed if the submittal is ready to go to the Contractor or Revise if it needs to be revised. This field determines which way it will go. See [Figure 14](#).

Figure 14 - Selecting the Response Status

The screenshot shows the 'Submittals' form in a web application. The 'Submittal Response' section is expanded, showing a dropdown menu for 'Submittal Response Status'. The dropdown menu is open, showing options: 'Select', 'Reviewed', 'Revise', and 'Project Name'. A red arrow points from a text box to the 'Reviewed' option. The text box contains the following information:

Response Status will determine the following:

- Reviewed – Back to creator to close submittal if they are agreeable to the response and notes provided.
- Revise – Back to creator

Creator Acknowledgement

1. Creator Acknowledgement. The Creator/Contractor must acknowledge the submittal decision to close out the Submittal. They also have the option of sending it back to the decision maker. To do this, select Send and choose the appropriate workflow action. Then click Send.

Figure 15 – Creator Acknowledgement

The screenshot shows the 'Submittals' form with a 'Workflow Action Details' modal open. The modal has a 'Workflow Actions' dropdown menu with options: 'Acknowledged Approved', 'Send Back to PM Team', 'Consultant Approver', 'Inspectors', and 'Project Managers'. The 'Acknowledged Approved' option is highlighted with a red box. The 'Send' button at the bottom right of the modal is also highlighted with a red box.

Reports

Users can run User Defined Reports for each project. The following user defined report are available for submittals in each project. See [Figure 16](#).

1. Submittal Log Report – Agency – Lists the submittals and their status.

Figure 16 – User Defined Report

The screenshot displays the 'User-Defined Report' configuration window for the 'Submittal Log Report - Agency'. The interface includes a left sidebar with a navigation menu where 'Reports' (1) and 'User-Defined' (2) are highlighted, and 'Submittal Log Report - Agency' (3) is selected. The main panel shows configuration options: 'Query and Format' with 'Report Format' set to HTML, 'Record count for UDR' set to 'Select', and 'Time Zone' set to '(UTC-08:00) Pacific Time (US)'. The 'Report Query Parameters' section includes fields for 'Status' (equals), 'Title' (contains), 'Specification Section' (contains), and 'Submittals / Due Date' (less than or equals). The 'Report Location' section has 'Workspaces' and 'Notes' tabs. A red box labeled '4' points to the 'Run Report' button. A red box labeled 'Note: Report may be filtered by entering parameters' is positioned over the 'Report Location' section.

Submittal WebEx Video Guides

To access WebEx recordings on Submittals, please select from the links below and enter the password PRIMELink1234 when prompted

- Submittal – Creating & Reviewing: Basic how-to guide on creating and reviewing submittals:
<https://sanantonio.webex.com/recording/service/sites/sanantonio/recording/e8eeb9d9b466103aa60f9aad41c34d69/playback>
- Reviewing Submittals – Advanced: In-depth video of the review process:
<https://sanantonio.webex.com/recording/service/sites/sanantonio/recording/playback/8996aa12b9d6103ab6cff2bda7da771f>

CLOSE PURCHASE ORDER (PO)

General

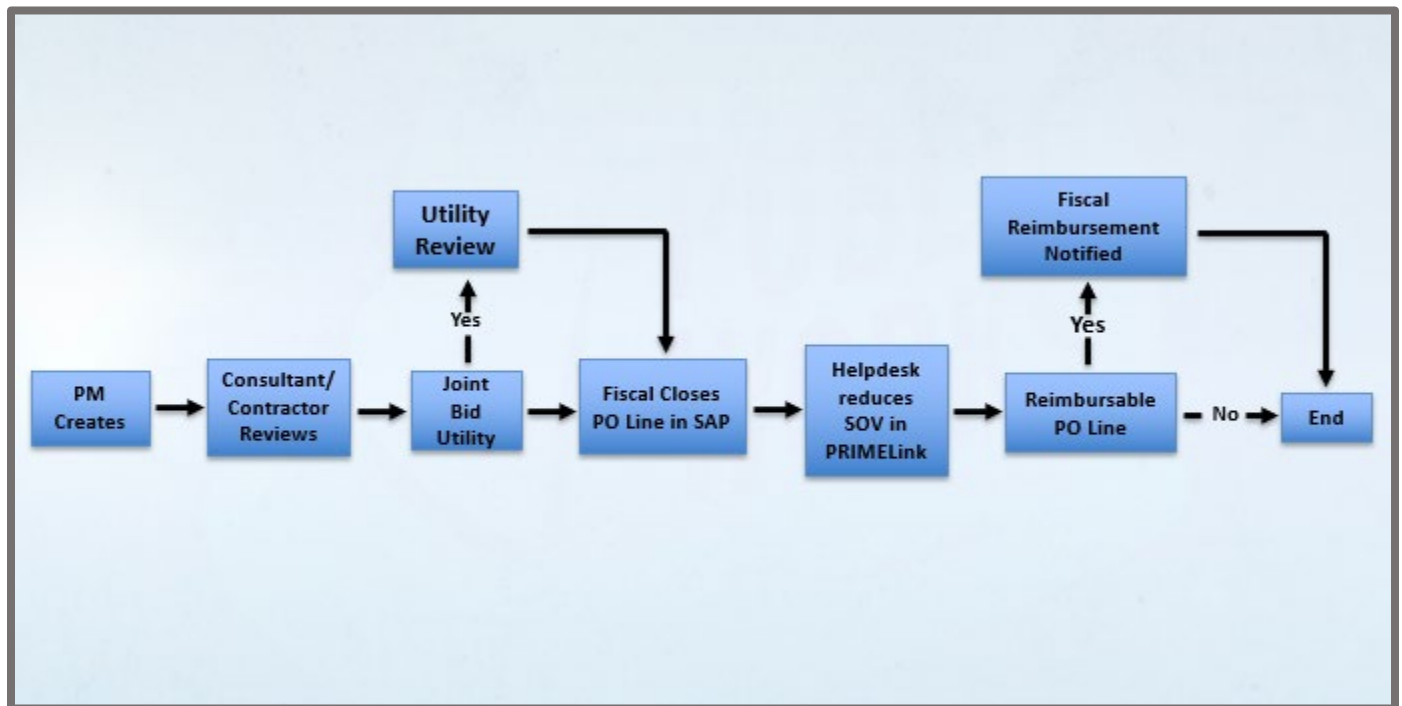
The Close PO Line (PO) Business Process (BP) is used to close a purchase order (PO) line on a standard contract (i.e., not an on-call, JOC, etc.). The BP is created by the City Project Team and is routed through the Consultant/Contractor and Utility if appropriate. When the routing is complete, the PO Line in SAP is closed and the Schedule of Values (SOV) for the PO Line in PRIMELink is reduced to zero remaining value. The Vendor will no longer be able to invoice on that PO Line. All change orders referencing the PO Line should have been approved through the system and all Payment Requests paid before submitting the BP. You will not be able to submit the BP if there is a Payment Request referencing this PO Line in routing to include being in the rejection step. **For Public Works, if you have multiple streets being paid from the same PO Line, do not submit this BP until all the streets hitting this PO Line are completed and billed.**

Workflow

The workflow is shown below. Highlights of the workflow are:

1. All steps are single approval. Only one person assigned to the step has to take action for the form to move forward.
2. The Consultant/Contractor will need to review the request after the Project Team creates the request.
3. Fiscal must close the PO Line in SAP before the SOV is reduced in PRIMELink.
4. The Contractor will not be able to bill against the PO Line once it has closed.

Figure 1 – Close PO Line Workflow



Close PO Line Business Process Location

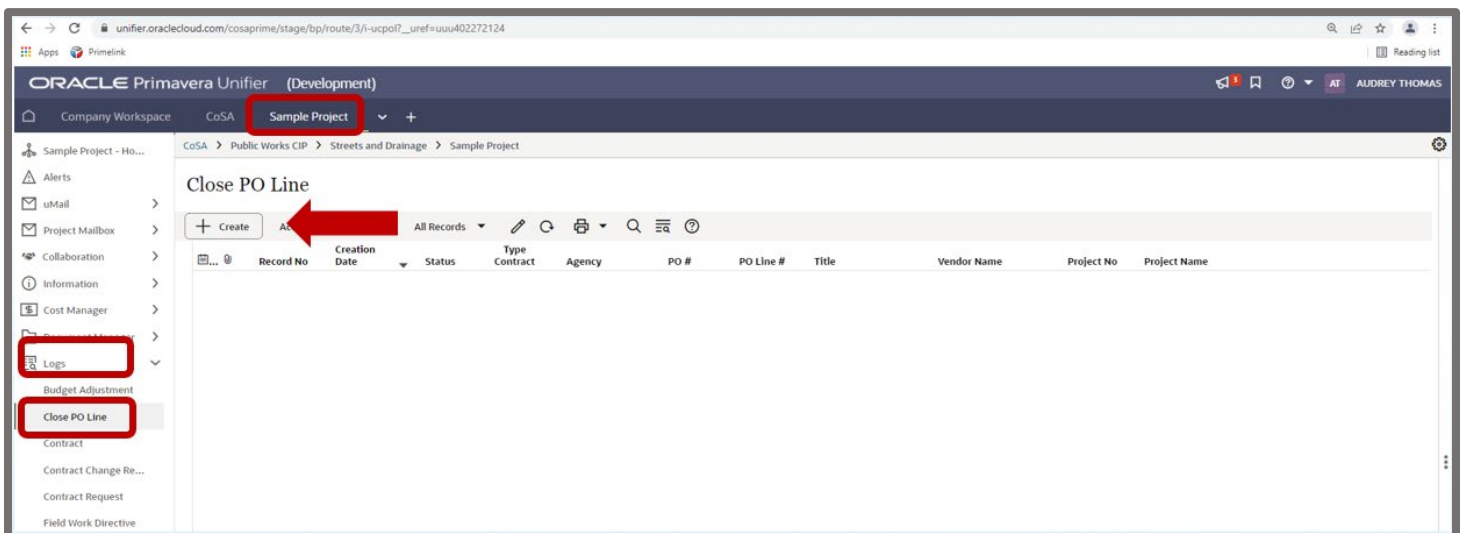
The Close PO Line business process is located under the project in the Collaboration BPs folder. See [Figure 2](#).

Creating a Close PO Line Record

The Close PO Line record is created by the Project Team when it is time to close out that PO Line. Key items on the Close PO Line record are listed below. See [Figures 3a](#) & [3b](#) for the form fields. PO Lines can only be closed on standard contracts, not on-call contracts. Once a PO Line is closed, a vendor will not be able to bill against it.

1. To create the Close PO Line record, go to the Close PO Line tab located in the Logs folder under the project and click on Create. See [Figure 2](#).

Figure 2 – Close PO Line Business Process Location



2. The Header Form is displayed in [Figure 3a](#). Select fields are highlighted below.
 - a. PO Line Record No: This is the only required field. The Project Team clicks on the Select button to see a list of the available PO Lines to close. Select the appropriate PO Line and it will fill out all the fields.
 - b. Remaining Amount: That is the remaining amount left on the Schedule of Values. If it is zero you do not have to submit a Close PO Line record because the line is already zero.
 - c. Invoice in Routing Check Section: Used to see if there are any payment requests in routing.
 - i. Update Data: When you change the value of this field it causes the form to recalculate the values.
 - ii. Invoice Variance: If the value is not zero, you will not be able to forward the Close PO Line. The value is equal to zero when there are no payment requests in routing or at the creator revise step.
 - d. Remarks: Include any remarks that would help identify the PO Line that needs to be closed. See [Figure 3b](#).
 - i. if you have multiple PRIMELink lines using the same SAP PO Line and need to close all, please include in the remarks "PRIMELink please close all PO Line "X" including contingency"
 - ii. make sure the PO Line Record No reflects the PO Line that are in the remarks

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Figure 3a – Close PO Line Header Form

Create New Close PO Line - Project No. XX-0000 - Google Chrome

unifler.oraclecloud.com/cosaprima/stage/bp/mod/bp/record/new/ucpol/90174/45136477__unef=uuu8052969463

Create New Close PO Line

Send Save

Creation

This business process can only be used for standard contracts, no on-call contracts. It is used to close a purchase order line. The vendor will not be able to bill against this line once completed. No payment requests can be in routing to use this form. Please make sure that all contract change requests and field work directives related to this PO Line have been processed.

Attachments Comments Linked Records Linked Mail

General Information

Project Number: XX-0000 Project Name: Sample Project

Record Number: Status:

Creator: AUDREY THOMAS Creation Date:

PO Line Record No *
PL-0000001 BE ⓘ

PO Line Record Number: PL-0000001

Title: 4500XXXXXX-1 PO Line ID: 4500XXXXXX-1

PO #: 4500XXXXXX PO Line #: 1

SAP Contract No.: 4600001433 Total PO Line Amount: 265,394.91

Total Invoiced To Date: 13,000.38 Remaining Amount: 252,394.53

Invoice in Routing Check

Update Data: Select All Invoices: 13,000.38

Completed Invoices: Invoice Variance:

Select picker to find PO Line to close. PO Line should match the PO Line in the remarks section.

Figure 3b – Close PO Line Header Form Continued

Create New Close PO Line - Project No. XX-0000 - Google Chrome

unifler.oraclecloud.com/cosaprima/stage/bp/mod/bp/record/new/ucpol/90174/45136477__unef=uuu8052969463

Create New Close PO Line

Send Save

Creation

Completed Invoices To Date: 13,000.38 Remaining Amount: 252,394.53

Invoice in Routing Check

Update Data: Select All Invoices: 13,000.38

Completed Invoices: 13,000.38 Invoice Variance: 0.00

Contract Information

Type Contract: Engineering Agency: City:

Phase: Construction Special Contract: No

Material Code: 80101023 Job Order Number:

SAP Vendor No.: 0001044959 Vendor Name: CLEARFIELD CONSTRUCTION LLC

SOV Line Change Information

SOV Line Changed Record:

Remarks

Remarks: please close all PO line "00000001" including contingency

Note: If you have multiple PRIMELink lines using the same SAP PO line and need to close them all please include in the remarks

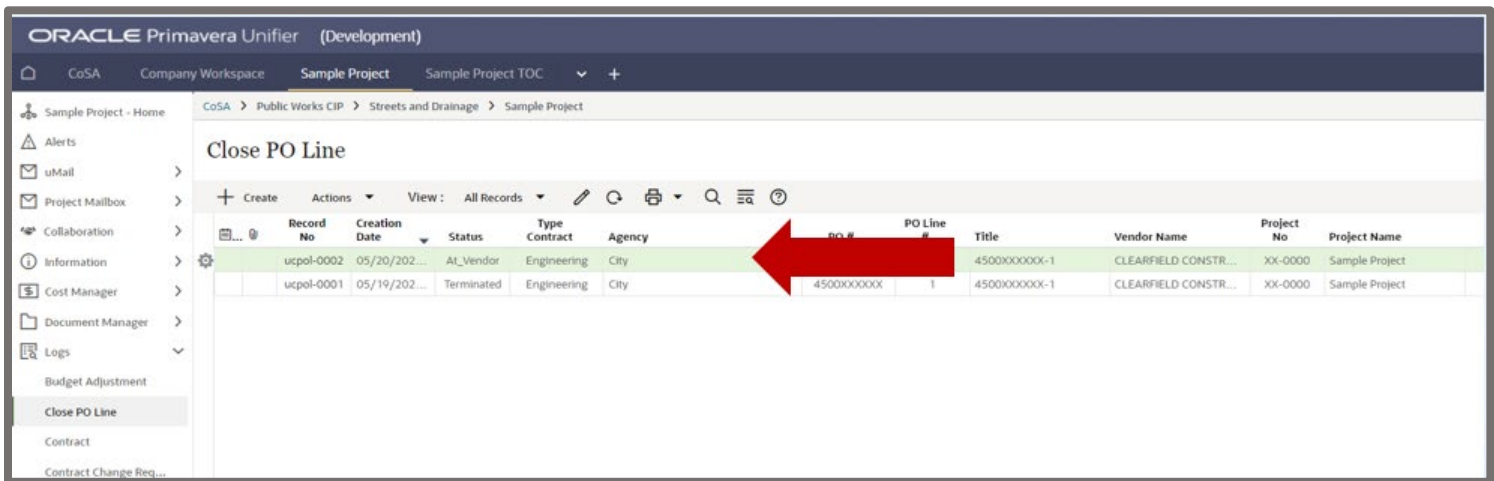
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3. There are instances in which PO Lines should NOT be closed:
 - a. If tasks are broken out for the vendor on separate PRIMELink PO Lines but are on the same PO Line in SAP.
 - b. If funds need to be moved from one PRIMELink PO line to another, a CCR will need to be created or an invoice transfer.

Reviewing a Close PO Line Record

1. Locate and select the Close PO Line record that is pending review as seen in [Figure 4](#).

Figure 4 – Selecting the Close PO Line Record for Review

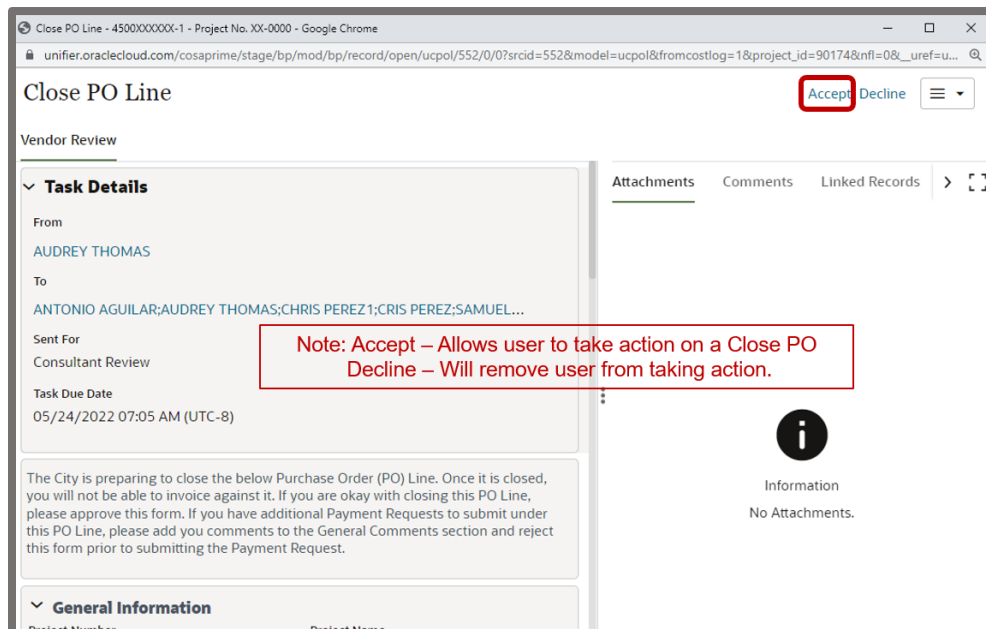


The screenshot shows the Oracle Primavera Unifier (Development) interface. The breadcrumb trail is: CoSA > Company Workspace > Sample Project > Sample Project TOC > +. The left sidebar contains various navigation options, with 'Close PO Line' highlighted. The main content area is titled 'Close PO Line' and displays a table of records. A red arrow points to the record with PO Line # 4500XXXXXX-1.

Record No	Creation Date	Status	Type	Contract	Agency	PO #	PO Line #	Title	Vendor Name	Project No	Project Name
ucpol-0002	05/20/2022	At_Vendor	Engineering	City		4500XXXXXX	1	4500XXXXXX-1	CLEARFIELD CONSTR...	XX-0000	Sample Project
ucpol-0001	05/19/2022	Terminated	Engineering	City		4500XXXXXX		4500XXXXXX-1	CLEARFIELD CONSTR...	XX-0000	Sample Project

2. You have the option to either Accept or Decline a Close PO Line request. Accepting will allow you to take action on the BP. Declining will not reject the request but will remove you from taking action or responding to the record. See [Figure 5](#).

Figure 5 – Accepting / Declining



The screenshot shows the 'Close PO Line' form in Google Chrome. The breadcrumb trail is: Close PO Line - 4500XXXXXX-1 - Project No. XX-0000 - Google Chrome. The URL is: unifier.oraclecloud.com/cosaprime/stage/bp/mod/bp/record/open/ucpol/552/0/0?srcid=552&model=ucpol&fromcostlog=1&project_id=901748&nfl=0&_uref=u... The form has two tabs: 'Vendor Review' and 'Task Details'. The 'Task Details' tab is active. It shows 'From: AUDREY THOMAS' and 'To: ANTONIO AGUILAR;AUDREY THOMAS;CHRIS PEREZ1;CRIS PEREZ;SAMUEL...'. The 'Sent For' is 'Consultant Review' and the 'Task Due Date' is '05/24/2022 07:05 AM (UTC-8)'. A red box highlights the 'Accept' and 'Decline' buttons at the top right. A red box contains a note: 'Note: Accept – Allows user to take action on a Close PO Decline – Will remove user from taking action.' The 'General Information' section shows 'Project Number' and 'Project Name'.

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3. Reviewers: If you still need to submit another payment request against the PO Line and **WILL NOT** be closing the PO Line, please add a reason in the General Comments section as seen in [Figure 6](#). Once a reason has been added in the Comments section, select Send then choose “Do NOT Close PO Line” in the Workflow Actions. This will cause the record to go back to the PM Team. See [Figure 7](#).

Figure 6 – Adding Comments

Close PO Line - 4500XXXXXX-1 - Project No. XX-0000 - Google Chrome

unifier.oraclecloud.com/cosaprime/stage/bp/mod/bp/record/opentask/34007802/undefined/undefined?__uref=uuu805296946t3#

Close PO Line

Send Save

Vendor Review

Material Code: 80101023

Job Order Number:

SAP Vendor No.: 0001044959

Vendor Name: CLEARFIELD CONSTRUCTION LLC

SOV Line Change Information

SOV Line Changed Record:

Remarks

please close all PO line "0000001" including contingency

Attachments

Comments

Linked Records

Post

Add attachments if applicable

Reviewers enter comments if choosing NOT to close the PO Line

Information

No Comments are available.

Figure 7 – Workflow Actions

Close PO Line - 4500XXXXXX-1 - Project No. XX-0000 - Google Chrome

unifier.oraclecloud.com/cosaprime/stage/bp/mod/bp/record/opentask/34007796/undefined/undefined?__uref=uuu586946999t3#

Close PO Line

Send Save

Vendor Review

The City is preparing to close you will not be able to invoice please approve this form. If you this PO Line, please add you this form prior to submitting

General Information

Project Number: XX-0000

Record Number: ucpol-0001

Creator: AUDREY THOMAS

PO Line Record No: PL-0000001

Workflow Action Details

Action Details

Workflow Actions *

Select

Select

Close PO Line

Do NOT Close PO Line

Send For

1

2

3

Cancel

Send

Printing the Close PO Line Record

A custom print file has been developed for this business process that will print the record in an easier to read format.

1. Right click on the Record that you want to print and choose Print-Custom. Custom Print Menu will open. Select Print.

Figure 8a – Custom Print

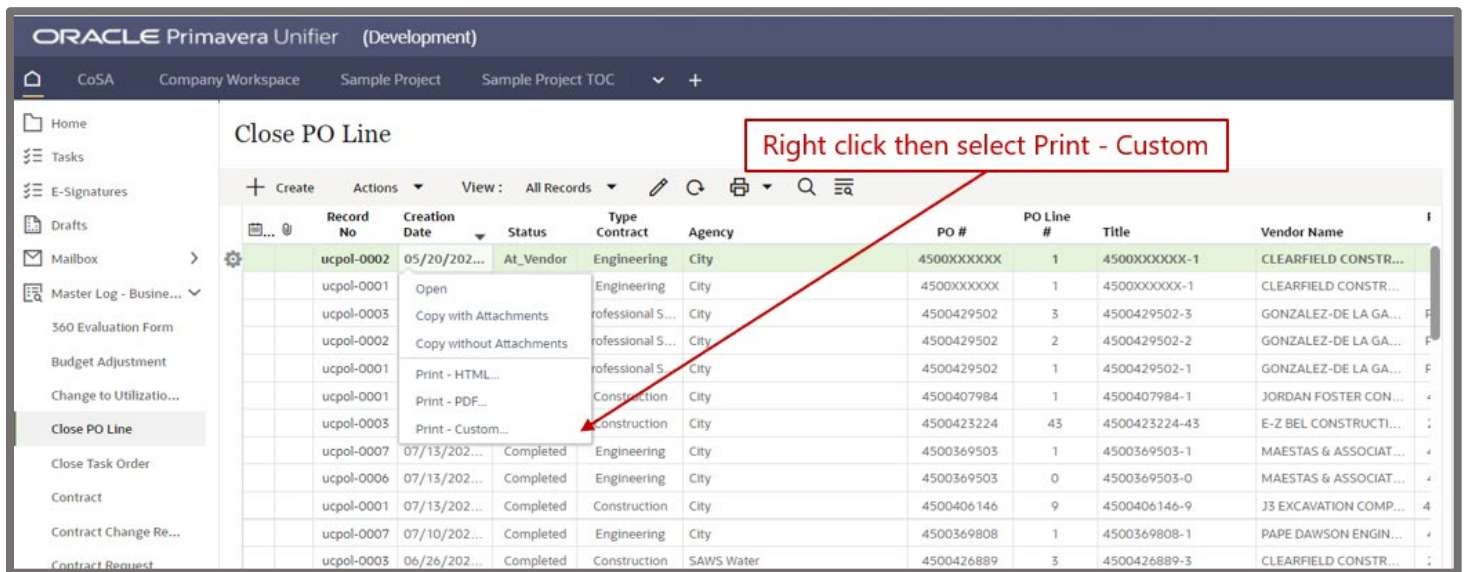
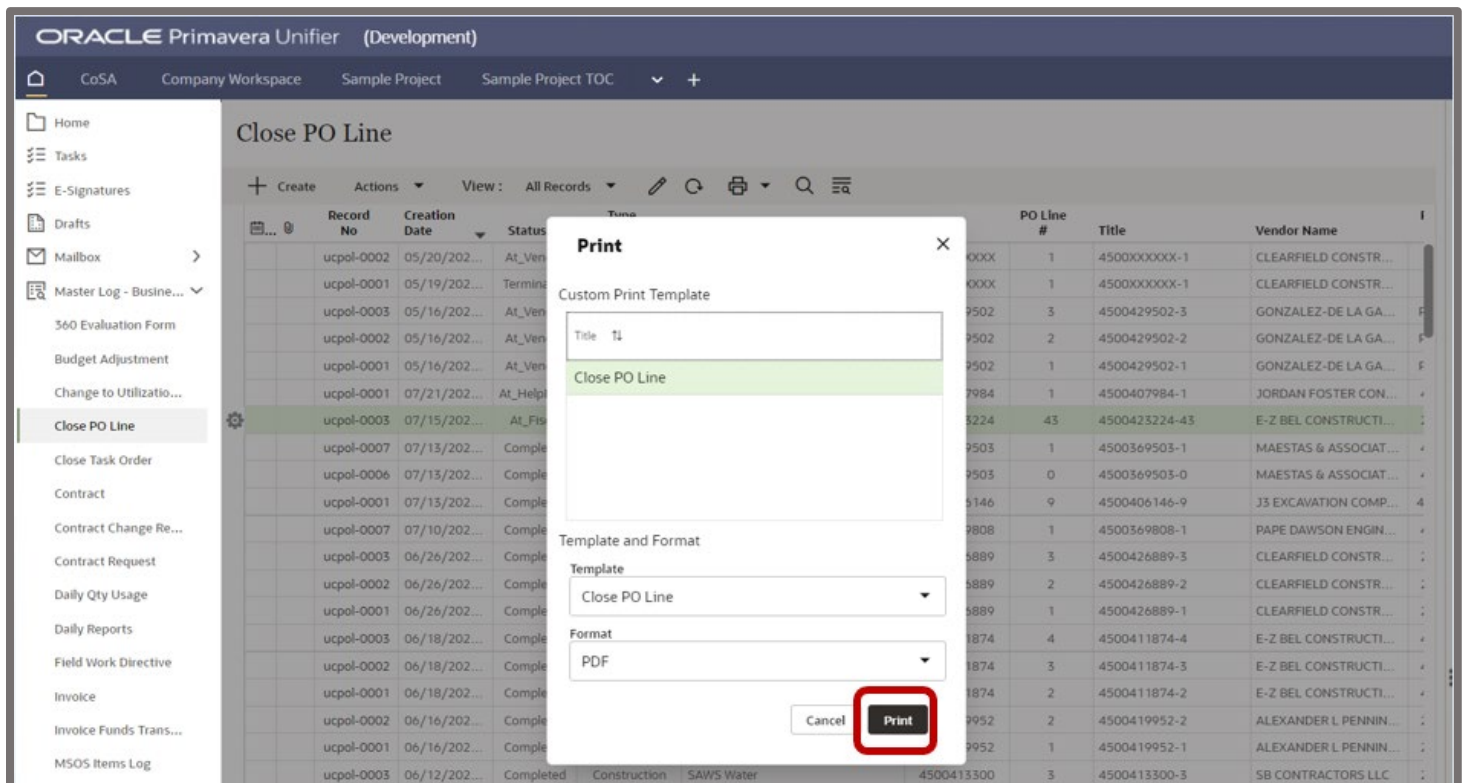


Figure 8b – Custom Print Continued



Close PO Line WebEx Video Guide

To access a WebEx recording on the Close PO Line BP, select the link below and enter the password PRIMELink1234 when prompted.

- Close PO Line:
<https://sanantonio.webex.com/recordingsservice/sites/sanantonio/recording/playback/10f21a66b782103abfefdac644130ca8>

CLOSE TASK ORDER (TO)

General

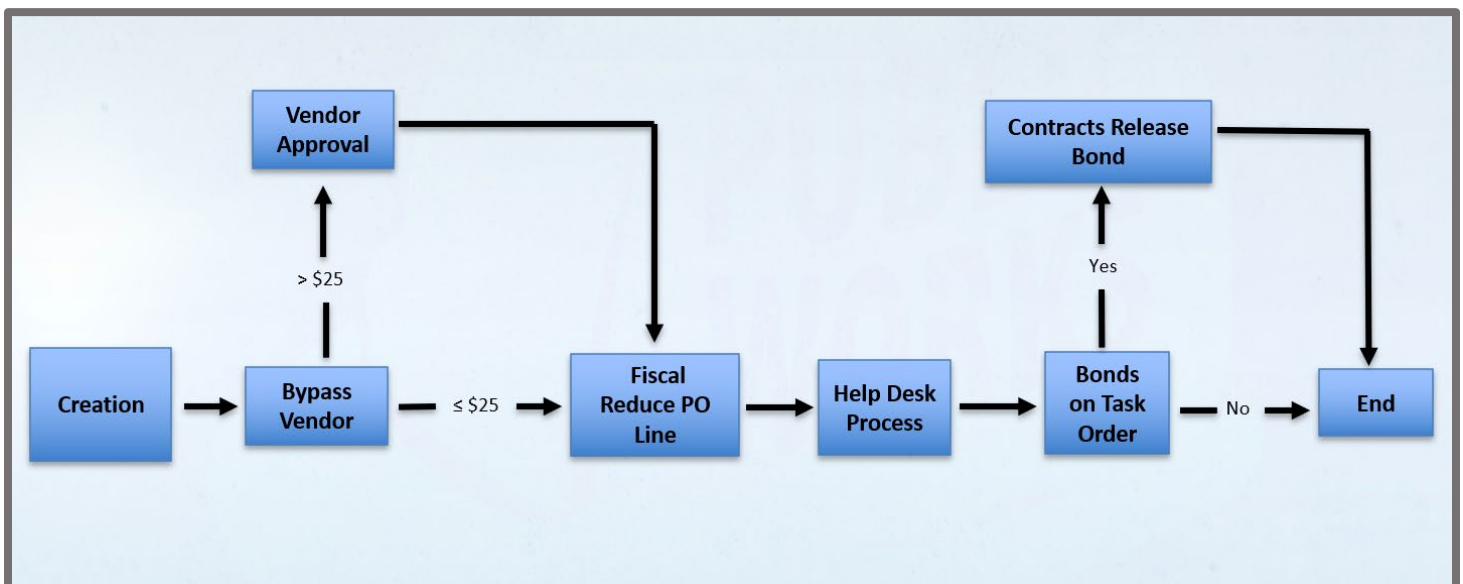
The Close Task Order (TO) Business Process (BP) is used to close a Purchase Order (PO) Line on an On-Call Contract that is paid from both the On-Call contract and the Project (Operations Traffic, JOC, etc.). This BP is created by the City Contract Manager and is routed through the Vendor. There are two workflows: one for a task order paid under the On-Call Contract and one for the task order paid under a Project. When the routing is complete, the PO Line in SAP is closed and the Schedule of Values (SOV) for the PO Line in PRIMELink is reduced to zero remaining value. The Vendor will no longer be able to invoice on the PO Line. All Payment Requests referencing this PO Line must be completed prior to submitting the Close Task Order BP. If the amount remaining is less than or equal to \$25.00, the Close Task Order bypasses the Vendor to reduce the number of task orders the Vendor must process for very small amounts. It is also possible for the Contract Manager to cause the Close Task Order record to bypass the Vendor for any amount if there is an overriding need for it. The User Defined Report named "Task Order Status with Project" can be used to identify those task orders that require closing and which workflow to use.

Workflow

The workflow is shown in [Figure 1](#). Highlights of the workflow are:

1. Close Task Orders are created by Contract Managers (CM).
2. The CM may bypass vendor review if the task order remaining amount is \$25.00 or less or if there is an overriding need for it.
3. Task orders that have \$0.00 remaining, do not require a Close TO.
4. Vendors can reject a Close TO which will send it for revision.
5. If the vendor rejects a Close TO, the CM may cancel it or resubmit for approval.
6. Approved Close TOs will automatically generate a SOV Line Change business process for the Helpdesk to finish the closeout.
7. Once the original task order is closed out, any additional task orders created to increase the original task order will be closed as if they are on the same PO Line.

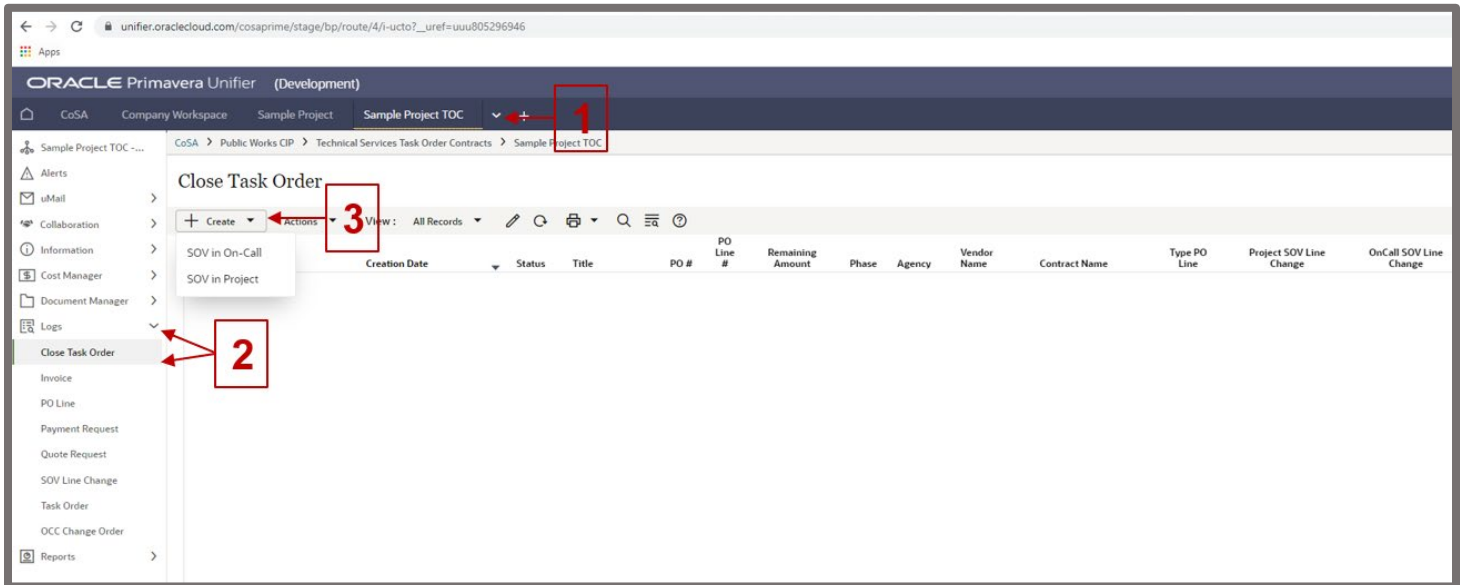
Figure 1 – Close TO Workflow



Close Task Order Business Process Location

The Close Task Order business process is located under the Contract Shell in the Logs folder. See [Figure 2](#).

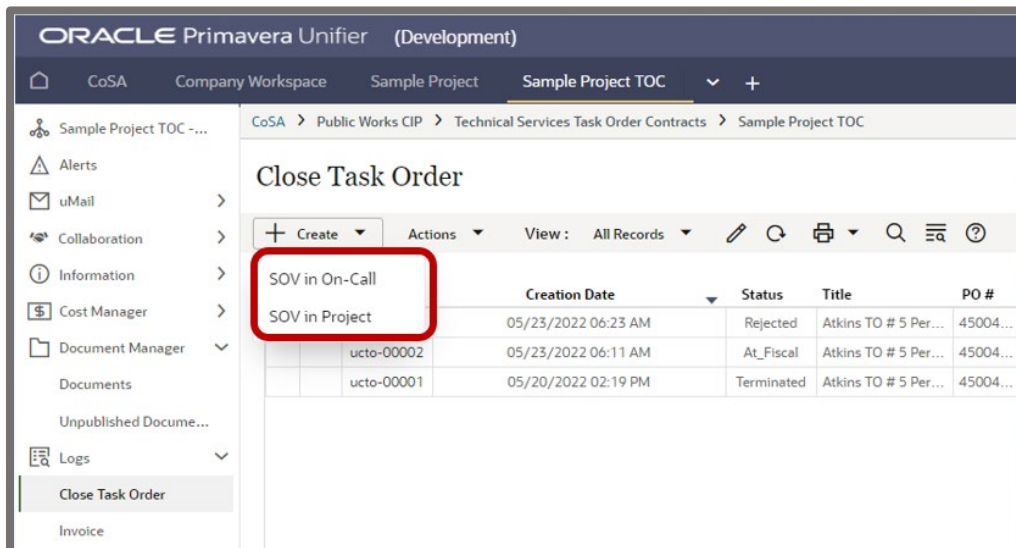
Figure 2 – Close TO Business Process Location



Creating a Close Task Order Record

1. All payment requests must be completed before closing a task order. Once a task order is closed, vendors will no longer be able to invoice against the purchase order line/task order.
2. To create the Close TO, go to Close Task Order located in the Logs folder under the contract shell and click on Create. You must select SOV in On-Call or SOV in Project depending on whether the PO Line is located in a project. See [Figure 3](#).

Figure 3 – Creating a Close TO



Vendor User Guide

3. The Close TO in On-Call Header Form is displayed in [Figure 4a](#) and [Figure 4b](#).

Figure 4a – Close TO in On-Call Header Form

Create New Close Task Order - Project No. 46000XXXX - Google Chrome

unifier.oraclecloud.com/cosaprime/stage/bp/mod/bp/record/new/ucto/90178/4513864?_uref=uuu8052969464#

Send Save

Creation

This business process is only used to close task orders and related PO Lines. The vendor will not be able to bill against this task order once completed. No payment requests can be in routing to use this form. This business process by-passes the vendor if the amount is less than \$25. Please make sure that all follow-on task orders related to this task order/PO Line have been processed.

General Information

Contract Shell No. 46000XXXX Contract Name Sample Project TOC

Record Number Status

Creator AUDREY THOMAS Creation Date

Task Order/PO Line to Close

Task Order * TO-128 FY20 NAMP CD3 Clark from Rig...

Task Order Record No. TO-0000137

PO No. 4500425534 Title TO-128 FY20 NAMP CD3 Clark from Rigby to Hiawatha

PO Line Record Number PL-0000103 PO Line ID 4500425534-101

PO # 4500425534 PO Line # 101

SAP Contract No. 4600018162 Total PO Line Amount 25,738.00

Total Invoiced To Date 0.00 Remaining Amount 25,738.00

Attachments Comments Linked Records Linked Mail

Information No Attachments.

Figure 4b – Close TO in On-Call Header Form Continued

Create New Close Task Order - Project No. 46000XXXX - Google Chrome

unifier.oraclecloud.com/cosaprime/stage/bp/mod/bp/record/new/ucto/90178/4513864?_uref=uuu863679048t4

Send Save

Creation

If you want to by pass the vendor you will first have to clear the By-Pass Vendor drop down list by moving it to the top and then change it to Yes.

By-Pass Vendor

By-Pass Vendor * Yes

By-Pass Vendor Reason * X Reason for bypass

Remarks

Remarks

Enter additional remarks to facilitate the closing of the task order

Enter 2000 or fewer characters.

Contract Information

Type of On-Call Contract Civil Engineering Services Task Order Contracts Group Type

Type Contract Engineering Agency City

Phase Design Special Contract No

Attachments Comments Linked Records Lin >

Information No Attachments.

Vendor User Guide

4. The Close TO in Project Header Form is displayed in [Figure 5a](#) and [Figure 5b](#).
 - a. The primary difference between the Close TO form in On-Call and the in Project is the Project version requires the Contract Manager to complete the Total PO Line Amount and Total Invoiced To Date fields and in the On-Call version these fields are automatically filled out.

Figure 5a – Close TO in Project Header Form

Create New Close Task Order - Project No. 46000XXXX - Google Chrome

unifier.oraclecloud.com/cosaprime/stage/bp/mod/bp/record/new/ucto/90178/45138657__uref=uuu8052969464

Send Save

Creation

This business process is only used to close task orders and related PO Lines. The vendor will not be able to bill against this task order once completed. No payment requests can be in routing to use this form. This business process by-passes the vendor if the amount is less than \$25. Please make sure that all follow-on task orders related to this task order/PO Line have been processed.

Attachments Comments Linked Records Linked Mail

General Information

Contract Shell No. 46000XXXX Contract Name Sample Project TOC

Record Number Status

Creator AUDREY THOMAS Creation Date

Task Order/PO Line to Close

Task Order * TO-13 FY18 Wren from Betty Jean... Task Order Record No. TO-0000022

PO No. 4500425747 Title TO-13 FY18 Wren from Betty Jean to Dead End

PO Line Record Number PL-0000011 PO Line ID 4500425747-15

PO # 4500425747 PO Line # 15

SAP Contract No. 4600018178 Total PO Line Amount * 0.00

Total Invoiced To Date * 0.00 Remaining Amount 0.00

Note: Must manually enter Total Invoiced to Date and Total PO Line Amount

Figure 5b – Close TO in Project Header Form Continued

Create New Close Task Order - Project No. 46000XXXX - Google Chrome

unifier.oraclecloud.com/cosaprime/stage/bp/mod/bp/record/new/ucto/90178/4513864?__uref=uuu863679048t4

Send Save

Creation

By-Pass Vendor

If you want to by pass the vendor you will first have to clear the By-Pass Vendor drop down list by moving it to the top and then change it to Yes.

By-Pass Vendor * Yes By-Pass Vendor Reason * X Reason for bypass

Remarks

Remarks

Enter additional remarks to facilitate the closing of the task order

Enter 2000 or fewer characters.

Contract Information

Type of On-Call Contract Civil Engineering Services Task Order Contracts Group Type

Type Contract Engineering Agency City

Phase Design Special Contract No

Must enter reason if by-passing Vendor.

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5. To submit the Close TO choose Send. Depending on whether the CM has chosen to bypass the vendor, the Close TO will submit to one of the following:
 - a. Vendor Review – CM has NOT bypassed the vendor
 - b. Fiscal Reduce PO – CM has bypassed the vendor

Figure 6 – Submitting

Workflow Action Details

Workflow Actions *

Submit

Send For Vendor Review

Start typing for suggestions...

Due Date Details

Task Due Date

05/24/2022 02:34 PM

Cancel Send

If bypassing vendor the workflow step will send for Fiscal Reduce PO; if not bypassing the vendor, it will send for Vendor Review.

Reviewing a Close Task Order Record

1. Locate and select the Close TO that is pending review as seen in [Figure 7](#).

Figure 7 – Selecting Close TO for Review

ORACLE Primavera Unifier (Development)

CoSA > Company Workspace > Sample Project > Sample Project TOC

Close Task Order

Record No	Creation Date	Status	Title	PO #	Remaining Amount	Phase	Agency	Vendor Name	Contract Name	Typ Li
ucto-00003	05/23/2022 06:23 AM	At_Vendor	Atkins TO # 5 Per...	45004...	115,280.00	Design	City	ATKINS NORT...	Sample Project TOC	OnCa
ucto-00002	05/23/2022 06:11 AM	At_Fiscal	Atkins TO # 5 Per...	45004...	115,280.00	Design	City	ATKINS NORT...	Sample Project TOC	OnCa
ucto-00001	05/20/2022 02:19 PM	Terminated	Atkins TO # 5 Per...	45004...	25.00	Design	City	ATKINS NORT...	Sample Project TOC	OnCa

Vendor User Guide

- You have the option to either Accept or Decline a Close TO. Accepting will allow you to take action on the BP. Declining will not reject the Close TO but will remove you from taking action on the Close TO Record.

Figure 8 – Accepting / Declining

The screenshot shows a web browser window with the URL `unifier.oraclecloud.com/cosaprim/stage/bp/mod/bp/record/open/ucto/5419/0/0?srcid=5419&model=ucto&fromcostlog=1&project_id=90178&nfl=0&_uref=uuu...`. The page title is "Close Task Order". At the top right, there are two buttons: "Accept" (highlighted with a red box) and "Decline". Below the buttons, there is a "Vendor Review" section. On the left, under "Task Details", it shows "From: AUDREY THOMAS" and "To: AUDREY THOMAS; Ashish Tripathi; CHRIS PEREZ; Vendor Approver; Vendor...". Below this, it says "Sent For: Vendor Review" and "Task Due Date: 05/25/2022 06:11 AM (UTC-8)". A red box highlights a note: "Note: Accept – Allows user to take action on a Close TO. Decline – Will remove user from taking action." On the right, there are tabs for "Attachments", "Comments", "Linked Records", and "Lin". Below the tabs, it says "Information: No Attachments." At the bottom, there is a "General Information" section with fields for "Contract Shell No." (46000XXXX), "Contract Name" (Sample Project TOC), "Record Number", and "Status".

- Vendors should post a reason for rejecting a Close TO request as seen in [Figure 9](#). Comments may not be deleted once posted.

Figure 9 – Reviewer Comments

The screenshot shows the same web browser window as Figure 8, but with the "Comments" tab selected. The "Comments" section is highlighted with a red box. Below the "Comments" tab, there is a text area for entering comments. To the right of the text area, there are "Clear" and "Post" buttons. A red box highlights the "Post" button. A red arrow points from the "Post" button to the text area. A red box highlights a note: "Vendors: if rejecting enter reason in Comments Section and add attachments if needed". Below the text area, there is an "Attachments" section with a "Clear" button and a "Post" button. At the bottom, there is a "Task Order/PO Line to Close" section with fields for "Task Order" (Atkins TO # 5 Perimeter Road PMMP Study), "Task Order Record No." (TO-000005), "PO No." (4500427112), and "Title" (Atkins TO # 5 Perimeter Road PMMP Study).

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4. Upon receipt of a Close TO, the receiver has the following options:
 - a. Approve Closing – sends the Close Task Order to Fiscal to reduce the PO
 - b. Reject – Sends the Close TO back to the CM to revise
5. Once the Close TO has been approved by the Vendor and has been sent to Fiscal to reduce the PO, the Helpdesk team will reduce the schedule to \$0.00 remaining value.

Figure 10 – Reviewer Workflow Actions

The screenshot shows a web browser window with the URL `unifier.oraclecloud.com/cosaprim/stage/bp/mod/bp/record/opentask/34007833/undefined/undefined?_uref=uuu863679048t4#`. The main content area is titled 'Close Task Order' and includes a 'Vendor Review' section. A 'Workflow Action Details' dialog is open, displaying a 'Workflow Actions' dropdown menu with the following options: 'Select', 'Approve Closing', and 'Reject'. The 'Send' button at the bottom right of the dialog is highlighted with a red box.

Revising a Close TO Record

1. After a Close TO is rejected by the Vendor, CMs will have the opportunity to revise the BP and Resubmit or Cancel the Close TO. See [Figure 11](#).

Figure 11 – Revising

The screenshot shows a web browser window with the URL `unifier.oraclecloud.com/cosaprim/stage/bp/mod/bp/record/opentask/34007843/undefined/undefined?_uref=uuu863679048t4#`. The main content area is titled 'Close Task Order' and includes a 'Creation' section. A 'Workflow Action Details' dialog is open, displaying a 'Workflow Actions' dropdown menu with the following options: 'Select', 'Resubmit', and 'Cancel'. The 'Send' button at the bottom right of the dialog is highlighted with a red box.

Task Order Status Report

The User Defined Report named “Task Order Status with Project” can be used to identify the task orders that have funds remaining and require closing. The report only looks at the first time a specific task order is entered. If a task order was submitted later to increase/decrease the amount of the original task order, the report includes the changes in the initial task order. The report also identifies the total authorized amount for the task order and the amount previously invoiced. This information is required for completing the Close Task Order BP. The report also identifies which project in PRIMELink the task order is being paid from.

1. The report is located in the User-Defined Reports section of the On-Call Contract or the On-Call Contract Group. See [Figure 12](#).
2. Open the Task Order status with Project Report

Figure 12 – Task Order Status with Project Report

The screenshot shows the Oracle Primavera Unifier (Development) interface. The left sidebar contains a navigation menu with items like Alerts, uMail, Collaboration, Information, Cost Manager, Document Manager, Documents, Unpublished Documents, Logs, Close Task Order, Invoice, PO Line, Payment Request, Quote Request, SOV Line Change, Task Order, OCC Change Order, Reports, and User-Defined. The 'Reports' item is highlighted with a red box. The main area displays the 'User-Defined Reports' section with a table of reports. The 'Task Order Status with Project' report is highlighted with a red box. A red arrow points from the 'Reports' menu item to the table with the text 'Select to view list of reports to run'.

Name	Description	Data Type	Access Type	Report Type	Enable for Integration	Owner	Last Run Date	Creation Date	Last Modified By
Expiring Technician Certi...	Provides a listing of Material ...	Material Test Technicia...	System	Tabular	No	CoSA Admin		08/21/2017 12:03 PM	SAMUEL HUTCH...
Late Workflow Tasks	All tasks that are late at a step...	Workflow information	System	Tabular	No	CoSA Admin		06/01/2012 07:02 AM	CoSA Admin
Material Test Reports Not...	Provides a list of the material ...	Material Test Log	System	Tabular	No	SAMUEL HUTC...		08/08/2018 07:39 AM	CoSA Admin
Material Test Reports Su...	This report shows the reports...	Material Test Log	System	Tabular	No	CoSA Admin		02/01/2018 02:44 PM	CoSA Admin
Material Test Technicians	Shows which test reports that...	Material Test Technicians	System	Tabular	No	CoSA Admin		04/12/2017 01:51 PM	CoSA Admin
PO Line Items	Used for setting up excel invoice	PO Line	System	Tabular	No	CoSA Admin		04/22/2014 12:00 PM	CoSA Admin
Remaining Schedule of V...	Best run in pdf or csv format.	Payment Request Sche...	System	Tabular	No	CoSA Admin		08/25/2015 02:22 PM	CoSA Admin
Remaining Summary Sch...	Best run in pdf. Note: Only L...	Payment Request Sche...	System	Tabular	No	CoSA Admin		10/17/2016 07:39 AM	CoSA Admin
Schedule of Values - As o...	Best run in pdf or csv format	Payment Request Sche...	System	Tabular	No	CoSA Admin		05/14/2013 07:34 AM	CoSA Admin
SOV Line Change	Used to develop excel invoice...	SOV Line Change	System	Tabular	No	CoSA Admin		04/22/2014 12:01 PM	CoSA Admin
Task Order Status with Pr...	Provides the current status of ...	Task Order Status	System	Tabular	No	SAMUEL HUTC...		06/25/2018 11:29 AM	SAMUEL HUTCH...

3. Set the top filter to “Open”. This will cause the report to only show the task orders that have funds remaining. YOU only need to close a task order if there are funds remaining. See [Figure 13](#).
4. Please select PDF when running report.

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Figure 13 – Filter Settings for Task Order Status with Project Report

5. The report will display as shown in [Figure 14](#).

Figure 14 – Task Order Status with Project Report

Task Order Status with Project

Project Name: Sample Project TOC

Project Number: 46000XXXXX

05/23/2022

Task Order Title	RECORD #	Agency	Project No.	Project Name	Date Approved	Last Invoiced	Total Auth Amount	Total Invoiced	Remaining Amount	TO Status	PO Line Status
Sample Project TOC											
NA	TO-0000008	City	Sample	Sample	05/23/2022		5,679.00	0.00	5,679.00	Open	Open
Sample Project TOC							5,679.00	0.00	5,679.00		
							5,679.00	0.00	5,679.00		
Total:							5,679.00	0.00	5,679.00		

Count: 1

WebEx Video Guide

To access a WebEx recording on Close TOs, select the link below and enter the password PRIMELink1234 when prompted:

- Close Task Orders:
<https://sanantonio.webex.com/recording/service/sites/sanantonio/recording/fbb7a0afb787103abff762a83002fd4a/playback>

ASSISTANCE

Vendor User Guide

Additional Resources

Find additional User Guides and Retainage Release Request submittal forms and procedures for horizontal and vertical projects at:

www.sanantonio.gov/TCI/CurrentVendorResources/COSAPrimeLink.aspx

Be on the lookout for periodic updates sent directly from COSA PRIMELink via e-mail on new procedures, overnight upgrades and other important insights.

Also, for information about receiving payments via ACH direct deposit, contact COSA Accounts Payable at 210-207-2064, select prompt #2.

Training

Vendors with active contracts are encouraged to attend hands-on COSA PRIMELink Training. These interactive, in-person sessions offer users a chance to log in via a staging environment to create invoices, RFIs, submittals and to approve/reject tasks. Contact the Helpdesk to register for the next beneficial session.

Webex training session are available Thursdays from 2:00 PM CT to 3:00 PM CT and Fridays from 3:00 PM CT to 4:00 PM CT. Alternative sessions are available upon request.

Instructional videos, straight from the helpdesk, will soon be available on-demand to help walk users through step-by-step directions on navigating some common questions.

Tips to Help Expedite Requests

To expedite the processing of task orders and other submissions, here are a few user tips directly from the helpdesk:

- Please be sure to share any pertinent information about the request in the Comments section to help in processing. Conversely, please look at the Comments section for any relevant notes.
- If cutting-and-pasting any numbers with commas, remember to remove the commas to let PRIMELink auto-populate them. An error message will occur otherwise.
- Users are asked to please add a phone number under profile for any follow-up submission questions.
- As needed, hit Control+F5 to Refresh the screen in PRIMELink.

Final Notes

Thank you for your interest in COSA PRIMELink. Please keep in mind that each day at approximately 4 p.m. Central, users may experience an interruption of service. This serves as a reminder to save drafts of work periodically, especially leading up to/and just after that timeframe to avoid any lost input.

Currently, COSA PRIMELink has a total of 1,500 active-user subscriptions. PrimeLink may automatically close-out service for users who do not access the system for a period of a couple of months. Should this happen, please reach-out to the PrimeLink team for reactivation.

PRIMELink may disable user access due to password sharing.

Vendor User Guide



CITY OF SAN ANTONIO PUBLIC WORKS DEPARTMENT

PRIMELink Helpdesk

Phone: 210-207-2019

E-mail: primelink@sanantonio.gov

Website: <https://unifier.oraclecloud.com/cosaprime/>

Information: www.sanantonio.gov/TCI/CurrentVendorResources/COSAPrimeLink.aspx

Mailing Address: Public Works Department

PO Box 839966

San Antonio, Texas 78283-3966