COSA PRIME*Link* General Guide

Capital Improvements Management Services

Updated - January 2013

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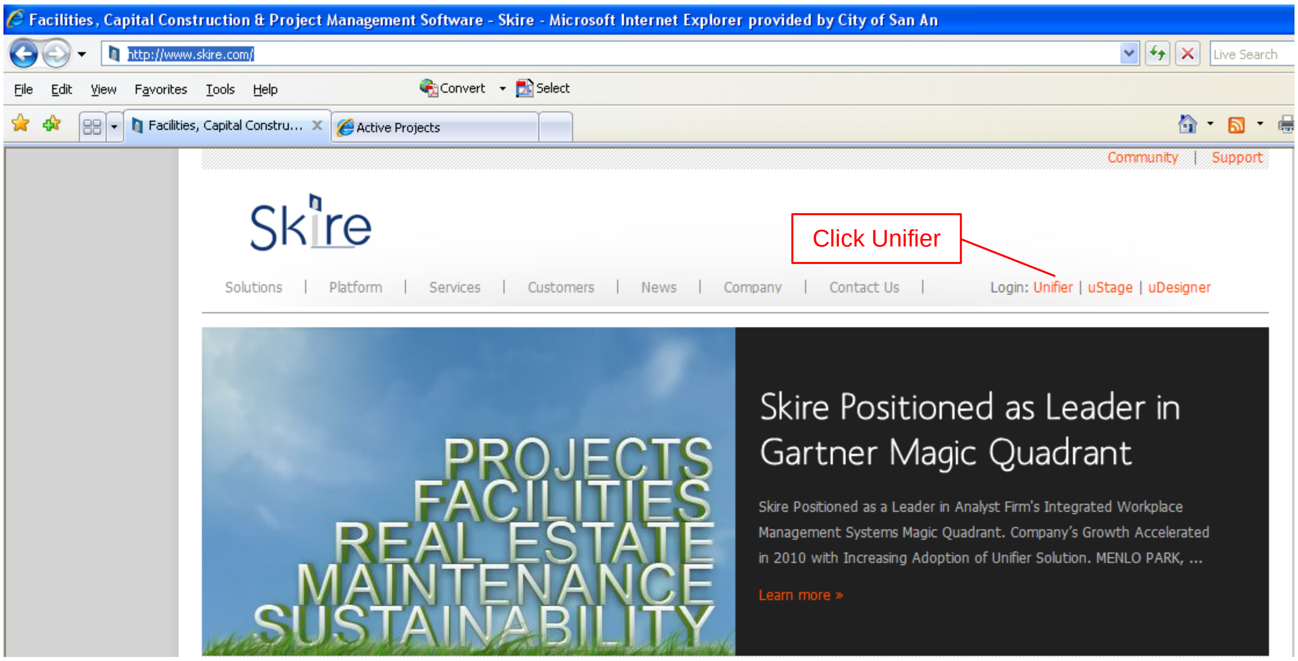
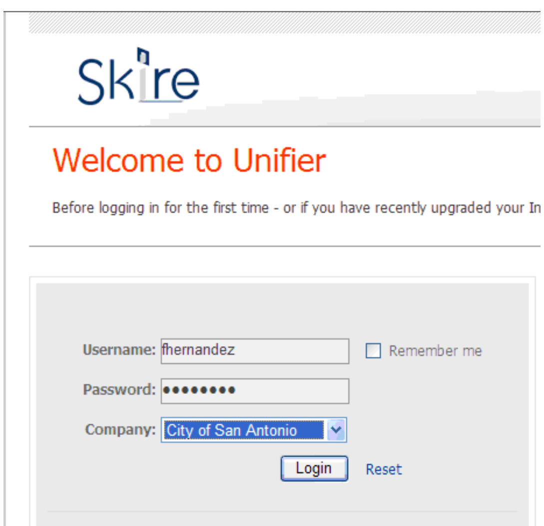
Logging into PRIME*Link*

PRIME*Link* is a web-based application and runs from any computer with Internet Explorer 6 SP2, 7, 8 or 9.

To login into PRIME*Link*, go to http://www.skire.com/ and click the Unifier link on the top right corner of the page.



You will enter your username, password, and if it prompts you and select "**City of San Antonio**" for company,



NOTE: Your username and password is provided by the Portal Team.

FYI: If your PRIME*Link* session is inactive for more than 1 hour, you will be automatically logged out from the system. The system will remain open on your screen, but you will be prompted to login again. **Any unsaved information will be lost.**

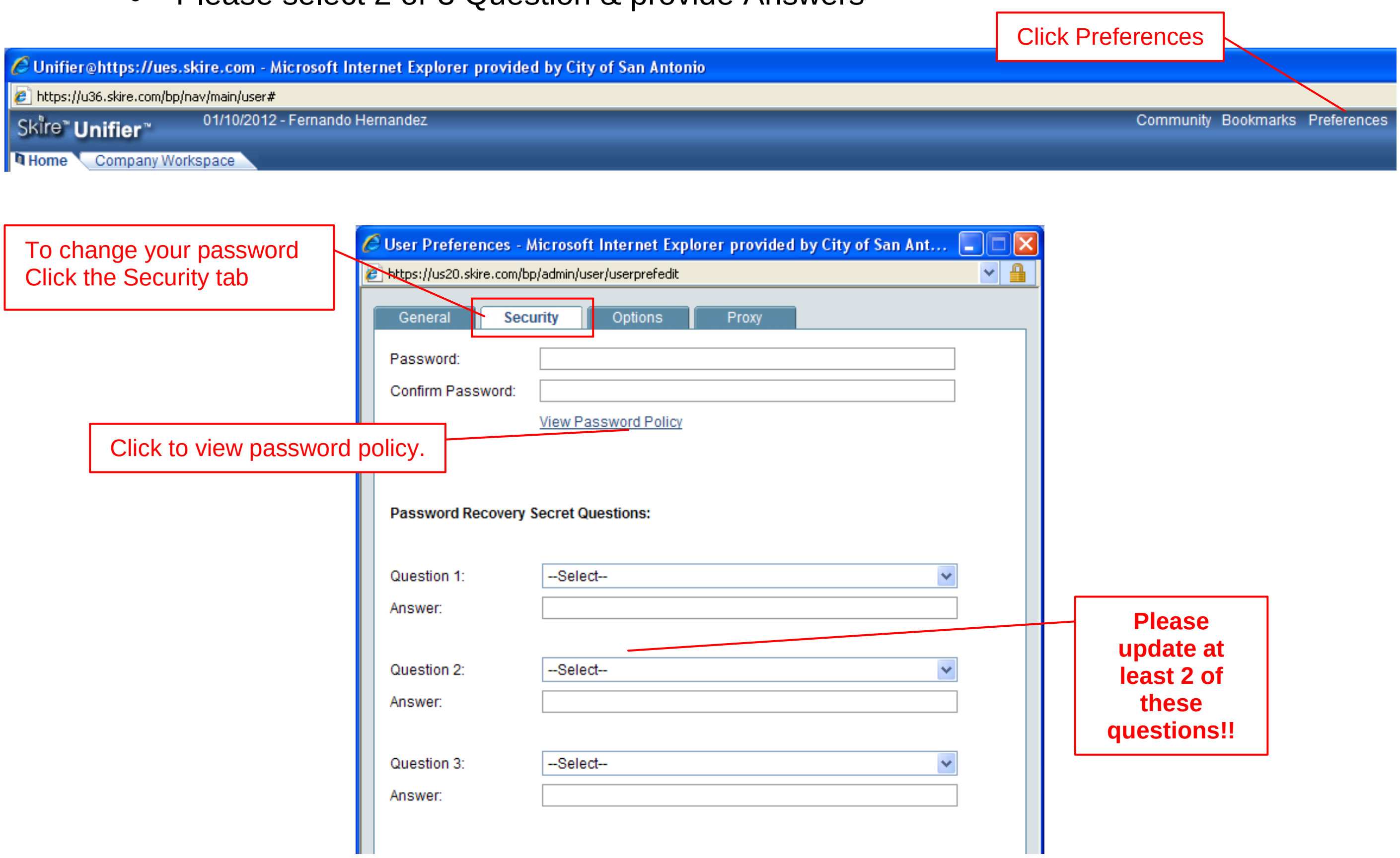
Change Password

Skire or the PRIMELink Helpdesk will send you an e-mail that contains your username and password. It is advised you change your password as soon as you login into PRIME*Link* for the first time.

Log on to PRIME*Link*

1. Click on the Preferences link on the top right corner of the page.
2. Select the Security Tab
   - Enter your new password
   - Confirm your new password

     NOTE: Your new password will take into effect next time you login into PRIME*Link*.
3. Password Recovery Secret Questions
   - Please select 2 or 3 Question & provide Answers

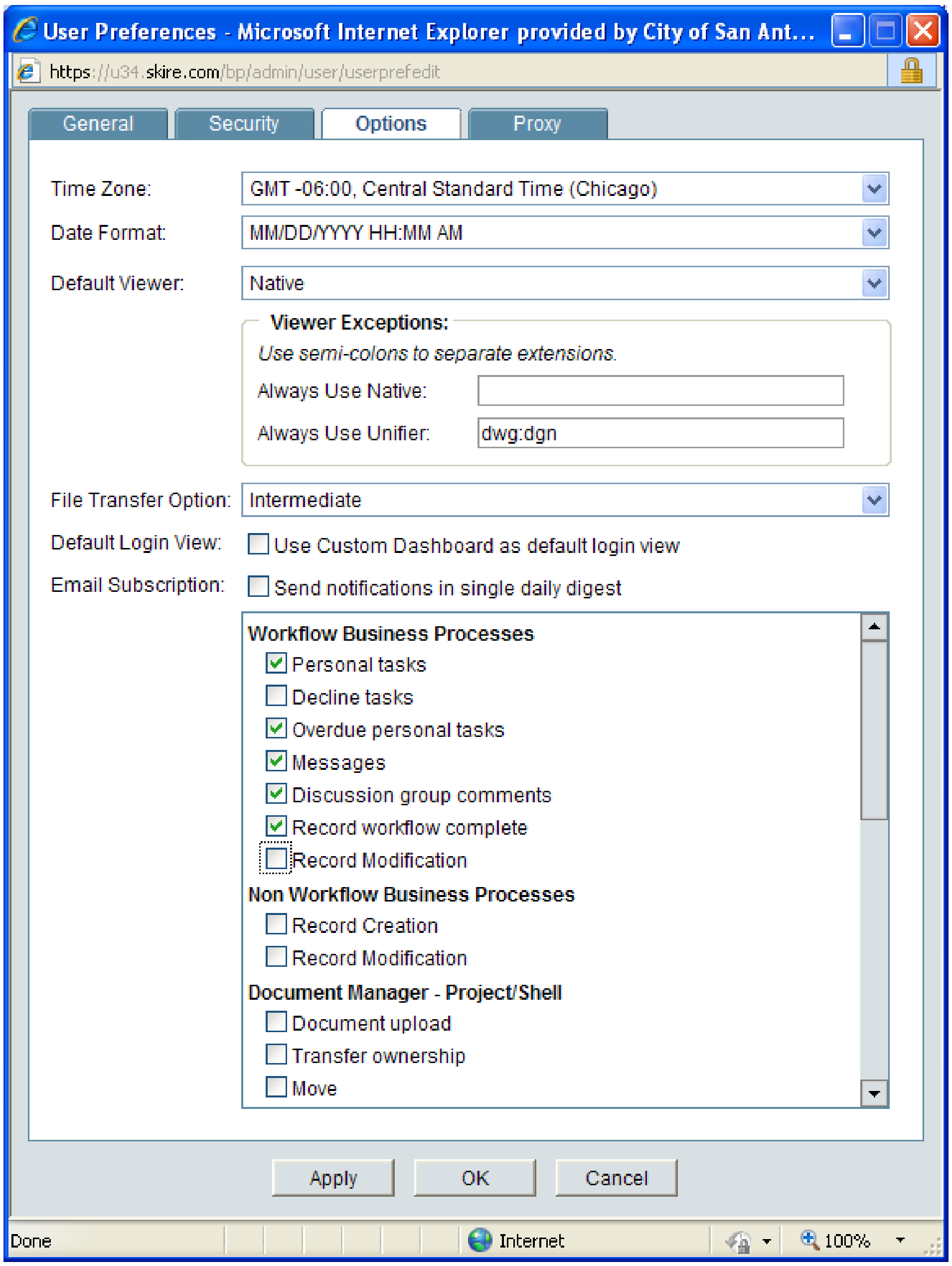


Change Attachment Preferences

To be able to attach documents to PRIMELink please do the following:

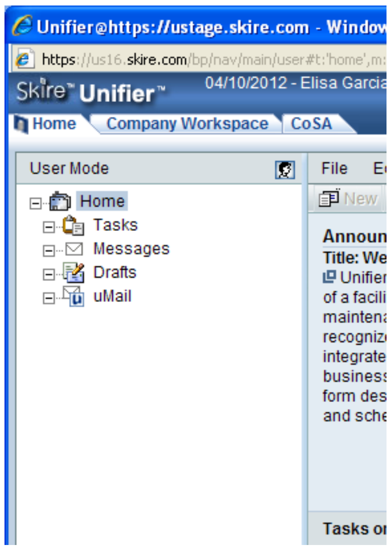
Go to Preferences, click on Options, make sure the “File Transfer Option”: has either “Intermediate” or “Basic”

Check “Always Use Unifier” and make sure it has - **dwg:dgn**



Navigation Tabs

PRIME*Link* uses a tab layout for navigation. The main three main tabs are:



<u>Home</u> is the default landing page.
Contains overall information

<u>Company Workspace</u> not being utilized

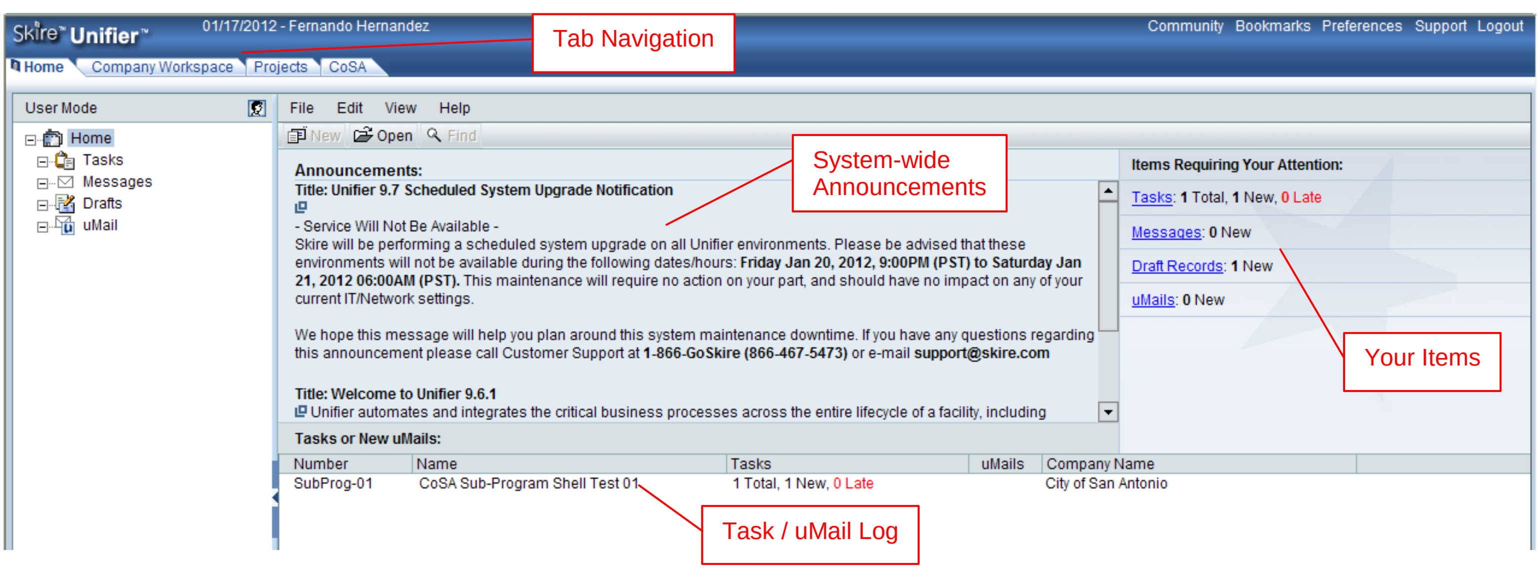
<u>CoSA</u> contains all current
On-Call Contracts and Projects

*If you do not see the **<u>CoSA</u>** tab and you have a contract or project in PRIMELink, call the PRIMELink Helpdesk at 210-207-2019*

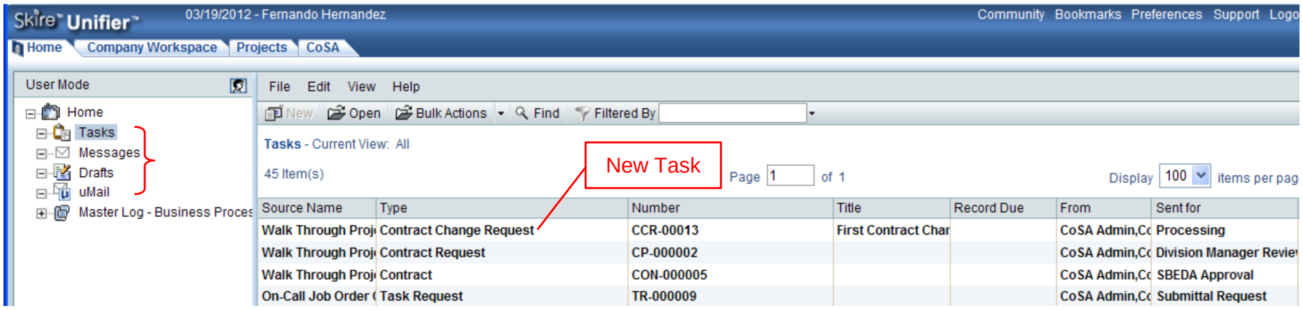
Home Tab

From the Home tab, you can do the following:

- Review all of your project's Tasks, Messages, Drafts and uMails
- View system-wide announcements



When you click on **Tasks** you will see something like the below:



- <u>Tasks</u> displays all tasks that you have received. Tasks include items that require review, approval, comment, etc.
    - A new task appears in **BOLD**
    - A late task appears in **RED**
    - A previously viewed task but not completed appears in normal font
- <u>Messages</u> displays copies of items which you have been cc'd
- <u>Drafts</u> displays saved drafts of items you have created but not sent
- <u>uMails</u> displays internal e-mail messages sent within the system

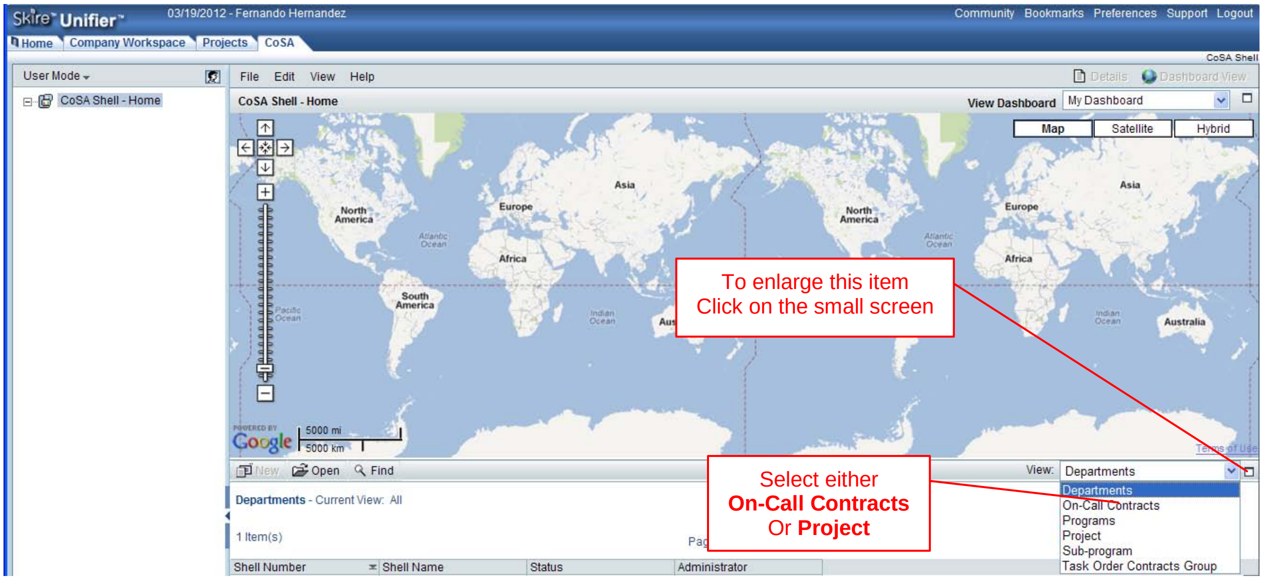
View Pending Tasks

<u>All Tasks:</u>
Click on the Home Tab
Select Task

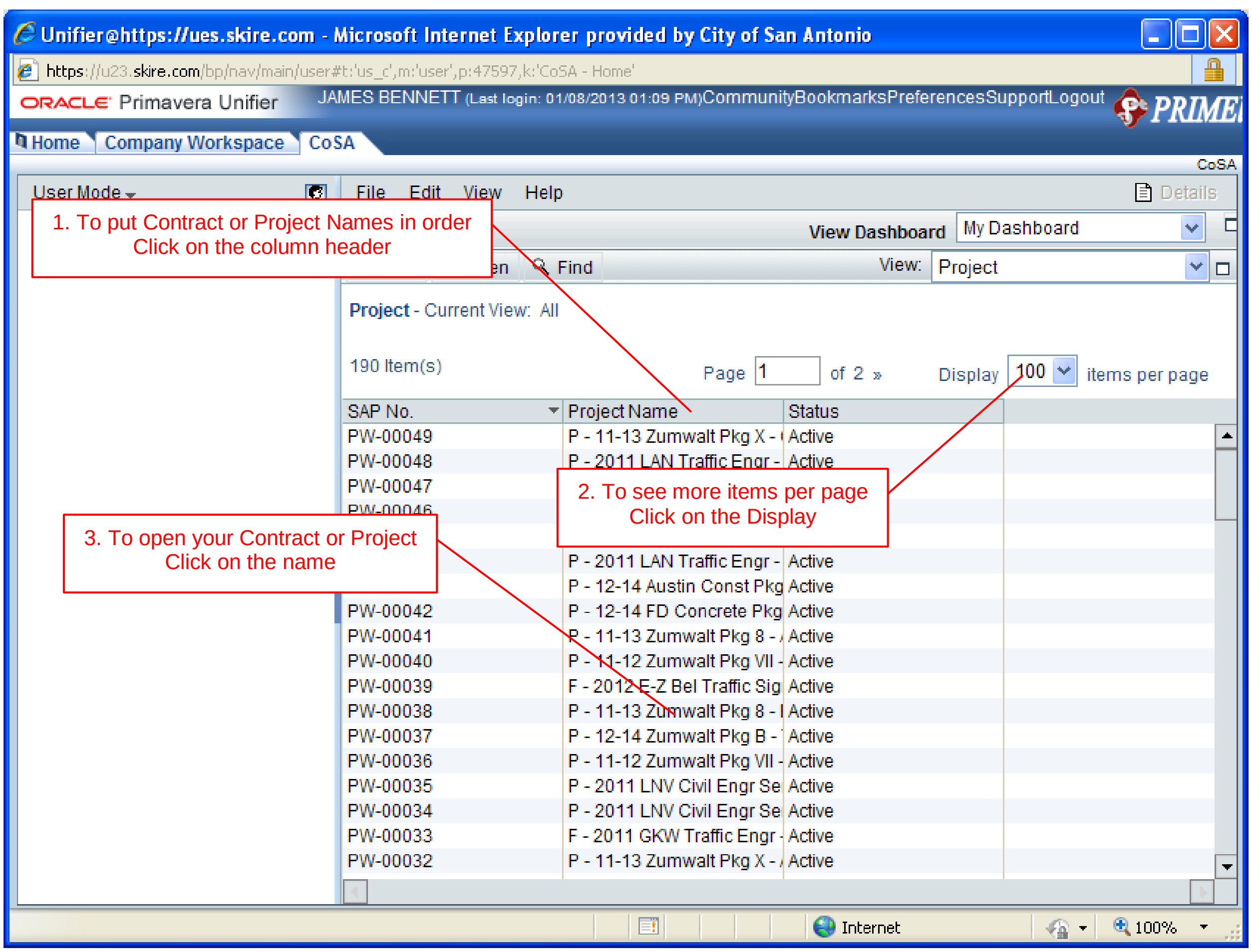
<u>Project Specific:</u>
Go to your project or from Home tab click on project
Select Task from the Dashboard

CoSA Tab

The CoSA tab contains all the current On-Call Contracts and Projects. You need to go to the far right side of the screen and select either: **On-Call Contracts** or **Project**.



Modify CoSA Tab



Letters before Project Names and Names stand for the following:

E – Environmental On-Call Contracts

F – Traffic Management/Operations Projects

H – CIMS and Public Works Horizontal Projects

J – JOC On-Call Contracts

K – Parks Department Projects

P – Public Works On-Call Contracts and Projects

R – Real Estate On-Call Contracts

T – Technical Services On-Call Contracts

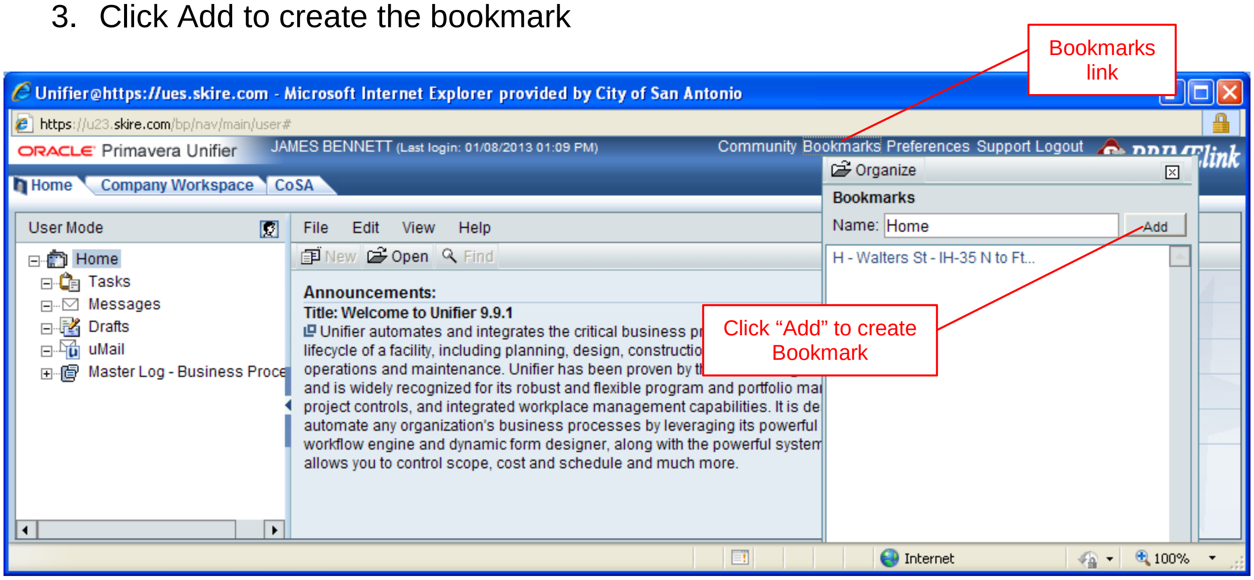
V – CIMS Vertical Projects and On-Call Contracts

VS – Convention Center Expansion Projects and On-Call Contracts

Bookmarks

You can create Bookmarks to frequently accessed Projects or On-Call Contracts.

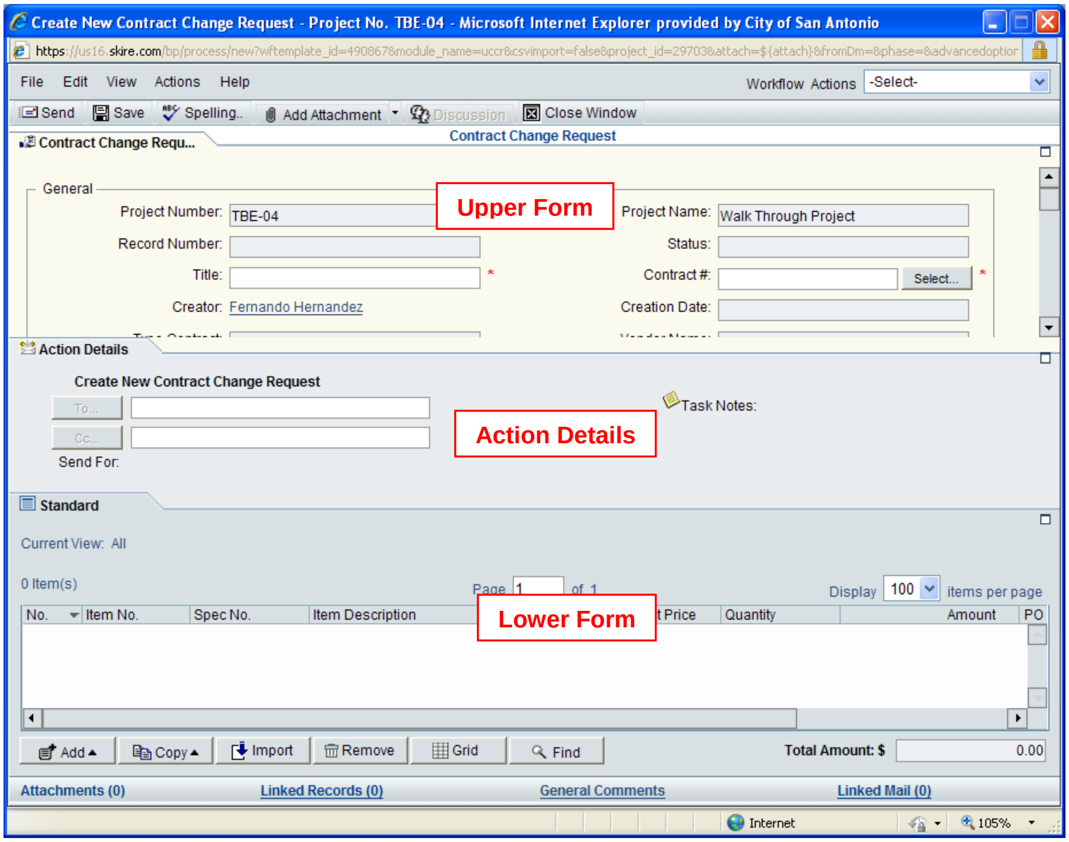
1. Navigate to the desired project or contract
2. Click the Bookmarks link on the upper right section of the window
3. Click Add to create the bookmark



PRIME*Link* Forms

You will be completing forms by entering information into form fields or selecting options through pickers, drop-down lists, and check boxes.

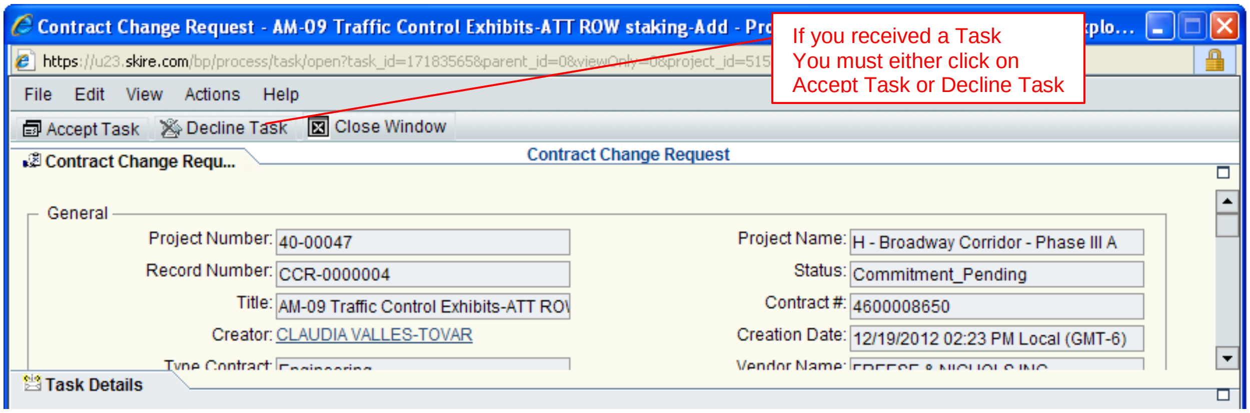
PRIME*Link* forms consist of one or more sections: Upper Form, Action Details, and Lower Form.

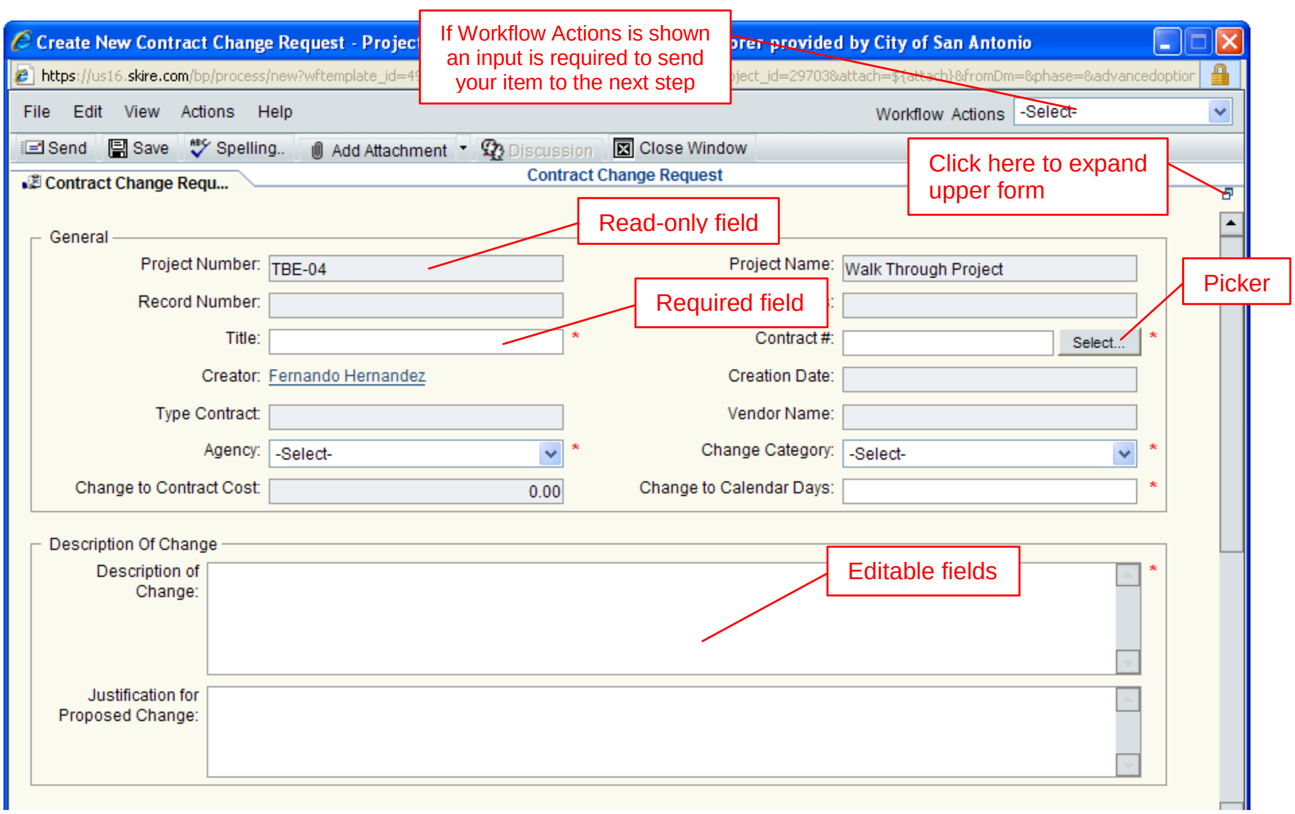


Upper Form

The upper form contains basic information. Fields in all forms will vary: editable, required, and read-only fields.

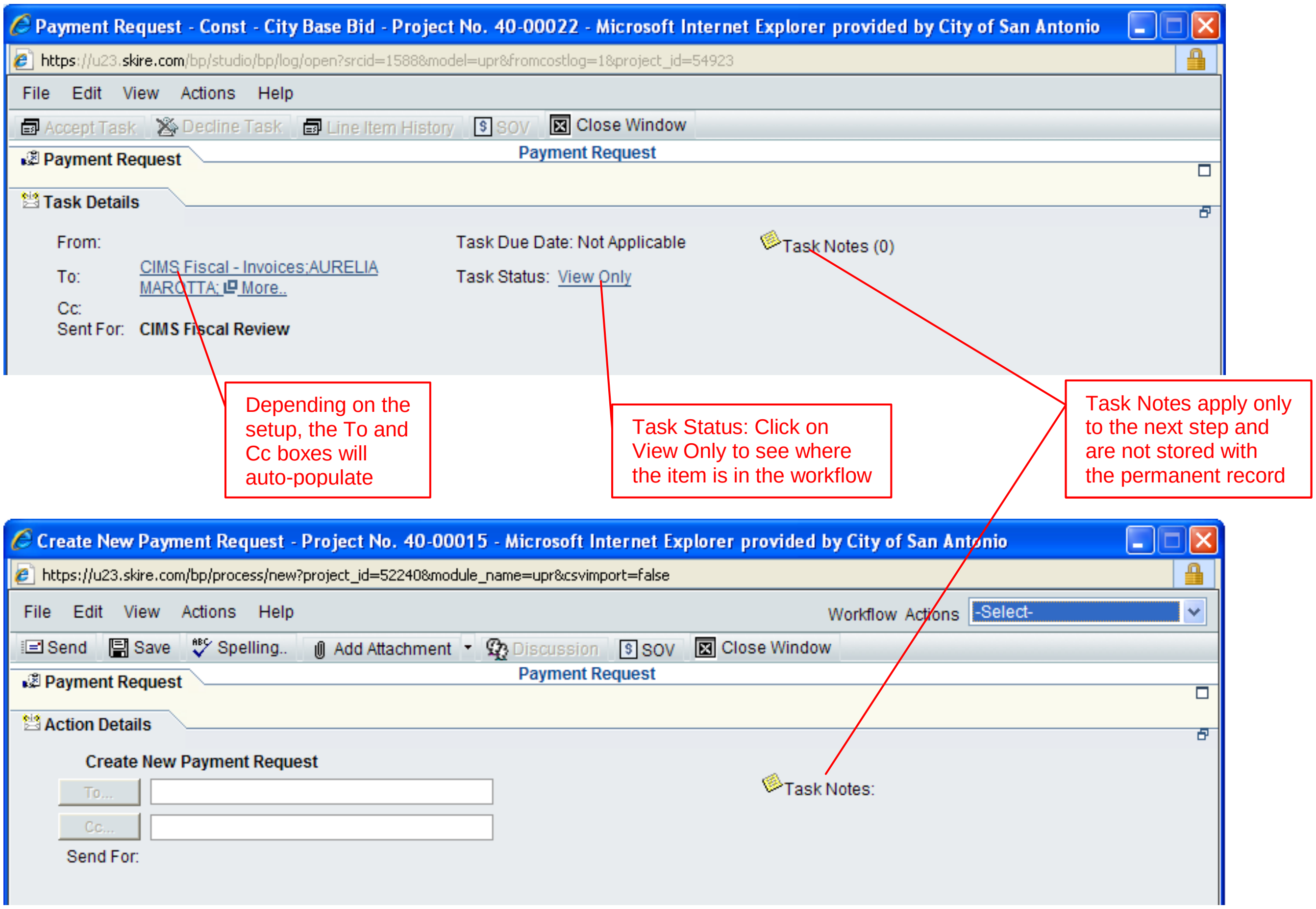
- Editable fields are shown by a white background text box
- Required fields are shown by a red * after the field
- Read-only fields are show by a blue-gray text box
- Pickers allow selecting from a list of options. Once selected, a dialog box will appear allowing to select from a list.





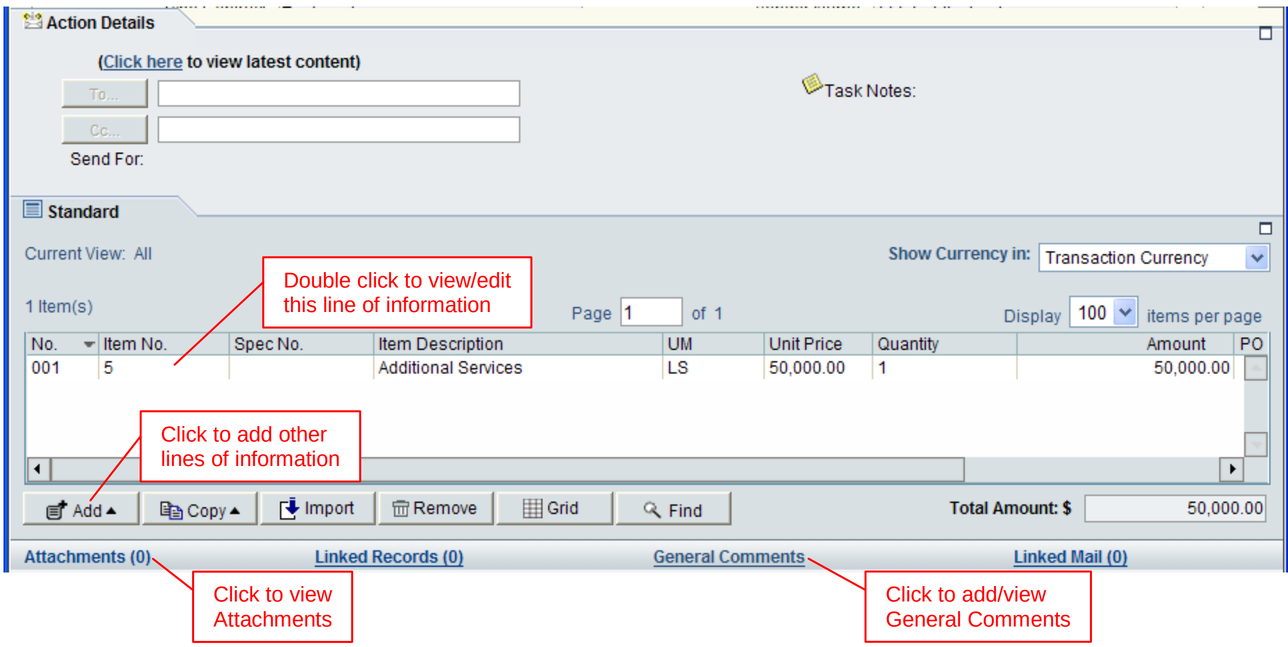
Action Details

An action detail shows that the task will be assigned to in the next workflow step, who it will be emailed to and workflow status.



Lower Form

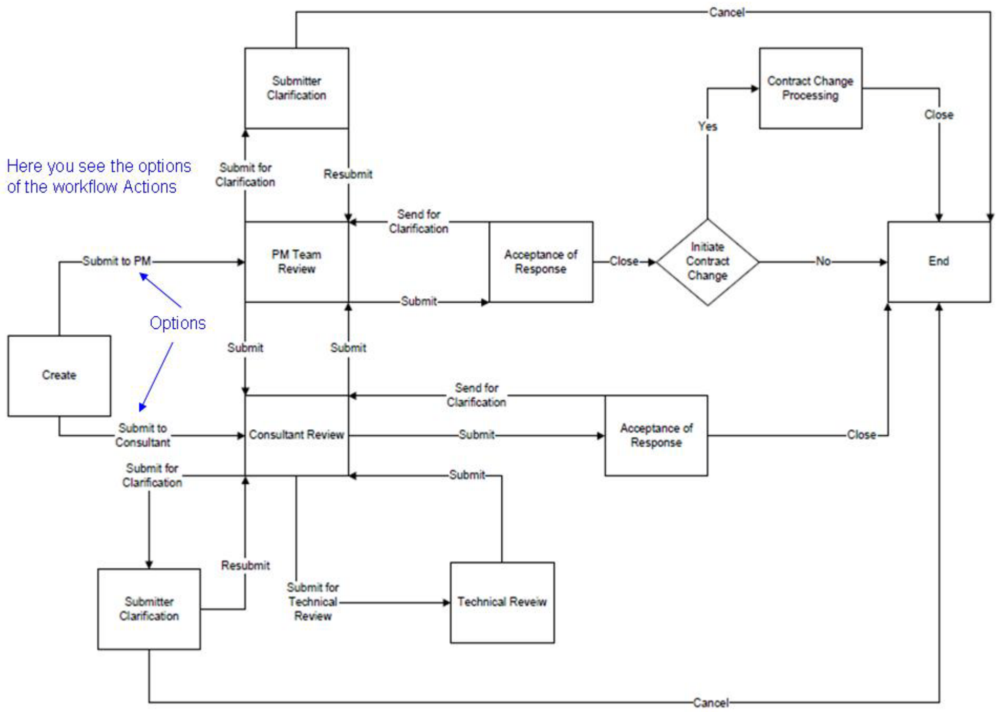
The lower form contains fiscal information and has the main content of the record, such as line items for a payment request, attachments, comments or directions. The following is an example of a List Items list.



Workflows

Most business processes in PRIME*Link* have an associated workflow. When you take and action on a form, you are completing a step on the workflow.

Below is a Request for Information (RFI)



Workflow:

Assign Task in Workflow

You can assign a task to someone else assuming it is allowed.

1. Open and Prior to accepting a task
2. Select Edit
3. Select Add Assignee to Current Step
4. Select the person
5. Click on Add
6. Click Ok

You will receive a message – "New assignees have been added to …."

Add a Proxy

Proxy will be utilized when you would like to permit someone else to process items in your absence.

1. Click on the Preferences link on the top right corner of the page
2. Click on Proxy tab
3. Click on Add
4. Click on Select
   - Select the name
   - Click on Add
   - Click Ok
5. Enter Start & End Dates (optional)
6. Click Ok

Remove Proxy

1. Highlight the name
2. Click Remove
3. Click Ok

Login as a Proxy

1. Highlight the name under – Users I can act as their proxy
2. Click Proxy Logon
3. You will logon on their behalf