



COSA PRIME*Link* General Guide

Capital Improvements Management Services

Updated - January 2013

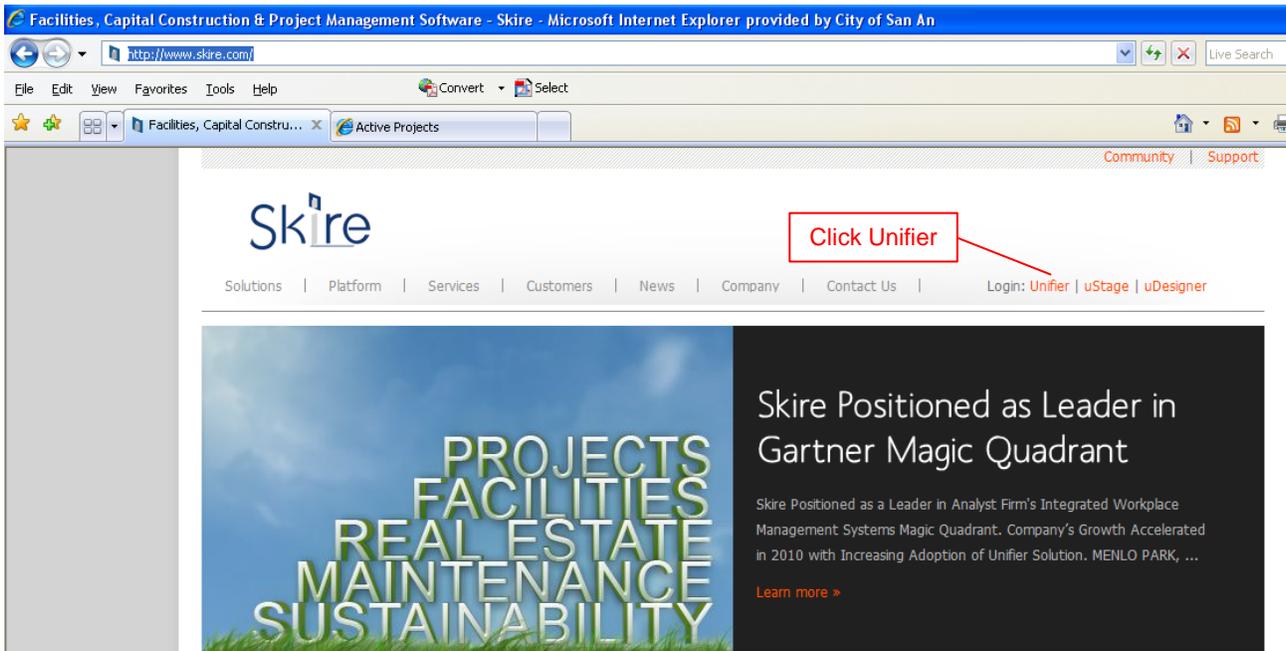
Table of Contents

Logging into PRIMELink	1
Change Password	2
Change Attachment Preferences	3
Navigation Tabs	4
Home Tab	4
View Pending Tasks	5
CoSA Tab	6
Modify CoSA Tab	6
Bookmarks	7
PRIMELink Forms	8
Upper Form	9
Action Details	10
Lower Form	11
Workflows	12
Assign Task in Workflow	12
Add a Proxy	13
Remove Proxy	13
Login as a Proxy	13

Logging into PRIMELink

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

To login into PRIMELink, 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,

Username: fhernandez Remember me

Password: ●●●●●●

Company: City of San Antonio

Login Reset

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

FYI: If your PRIMELink 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.**

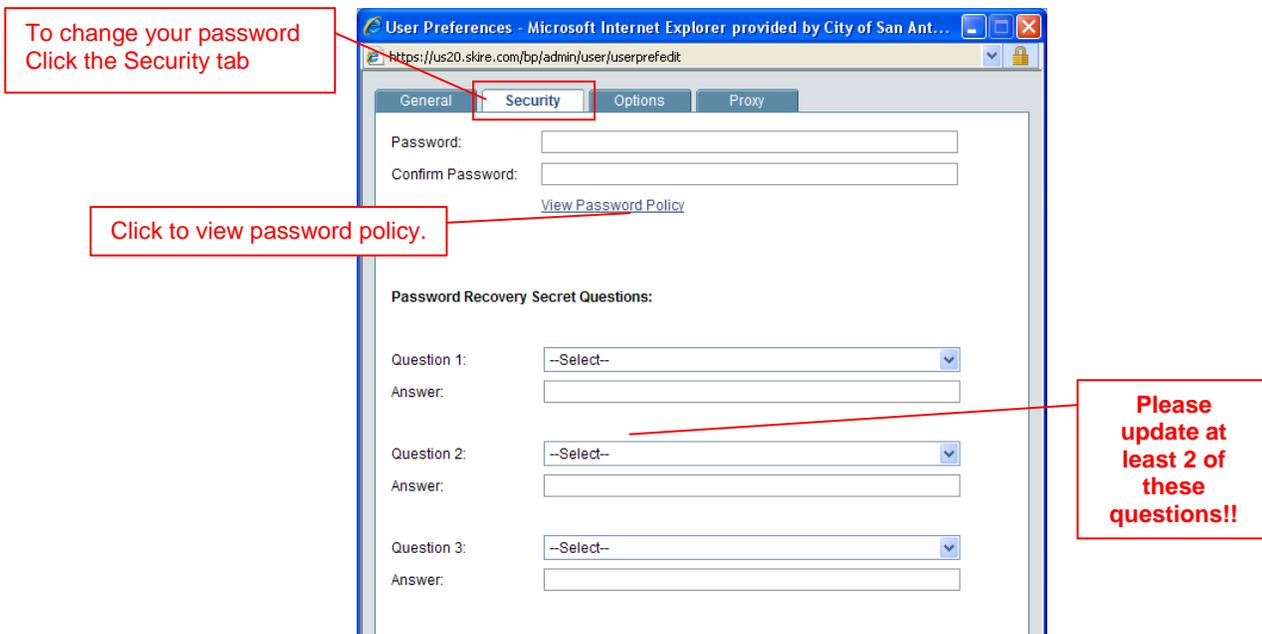
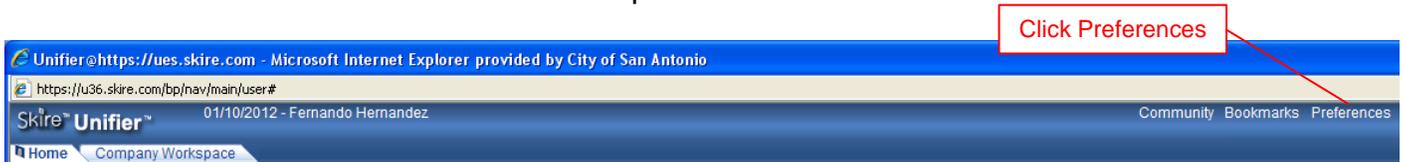
Change Password

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 PRIMELink for the first time.

Log on to PRIMELink

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 PRIMELink.
3. Password Recovery Secret Questions
 - Please select 2 or 3 Question & provide Answers

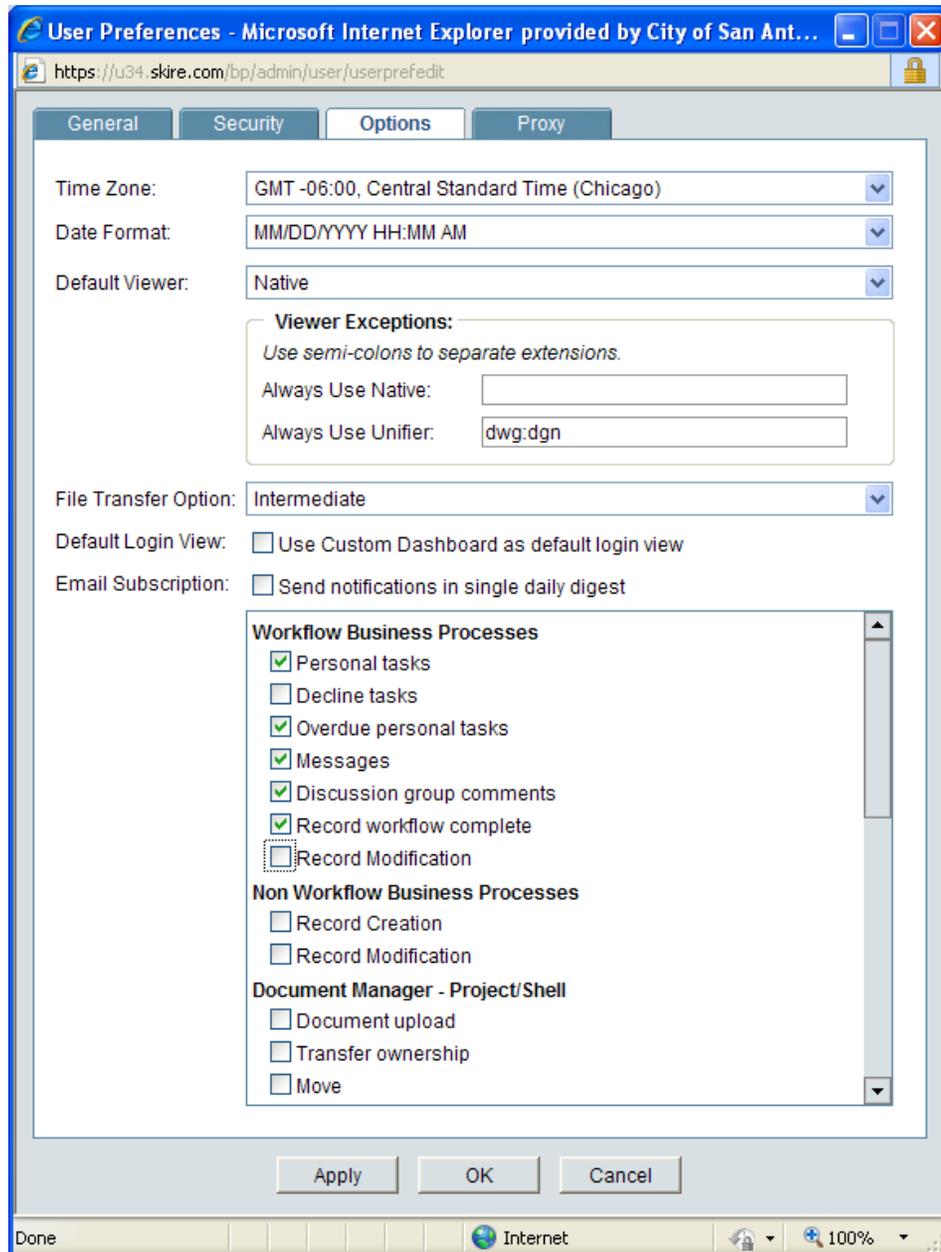


Change Attachment Preferences

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

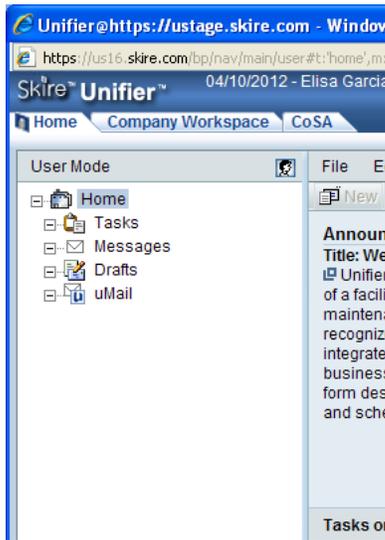
Go to Preferences, click on Options, make sure the “File Transfer Option”: has either “Intermediate” or “Basic”

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



Navigation Tabs

PRIMELink uses a tab layout for navigation. The main three main tabs are:



Home is the default landing page.
Contains overall information

Company Workspace *not being utilized*

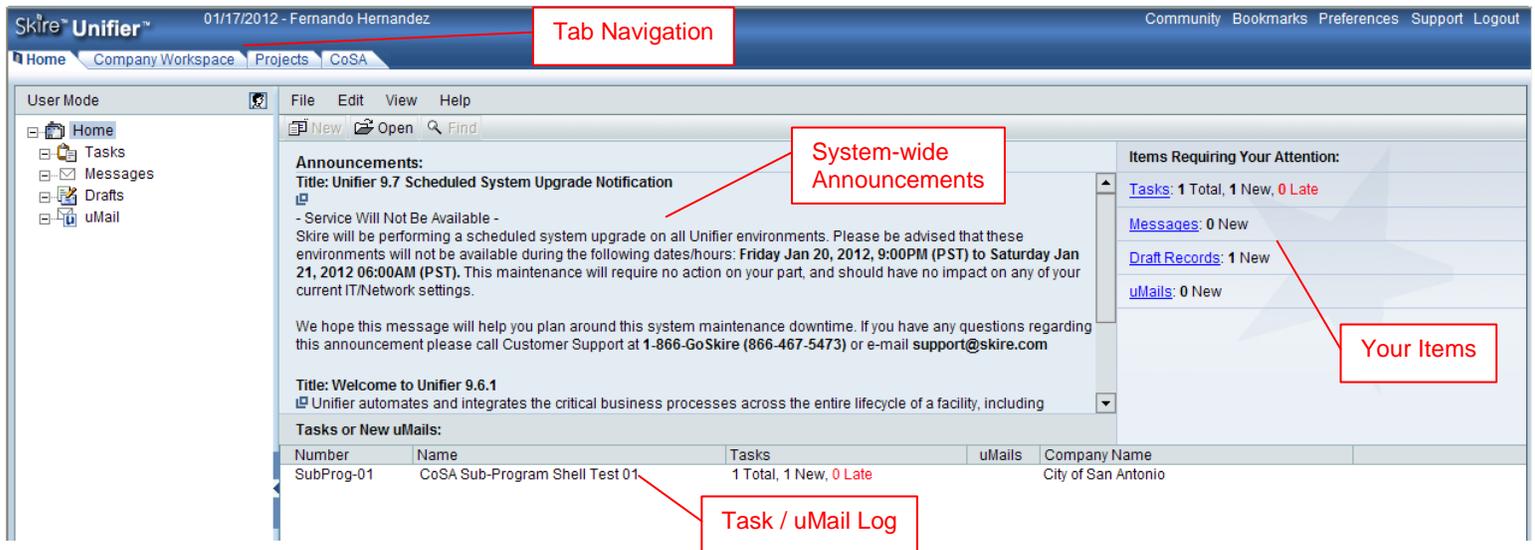
CoSA contains all current
On-Call Contracts and Projects

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

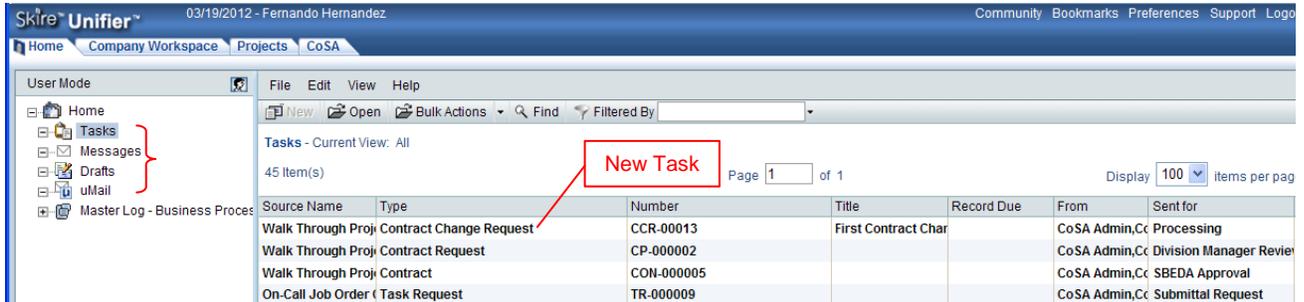
Home Tab

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:



- **Tasks** 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
- **Messages** displays copies of items which you have been cc'd
- **Drafts** displays saved drafts of items you have created but not sent
- **uMails** displays internal e-mail messages sent within the system

View Pending Tasks

All Tasks:

Click on the Home Tab

Select Task

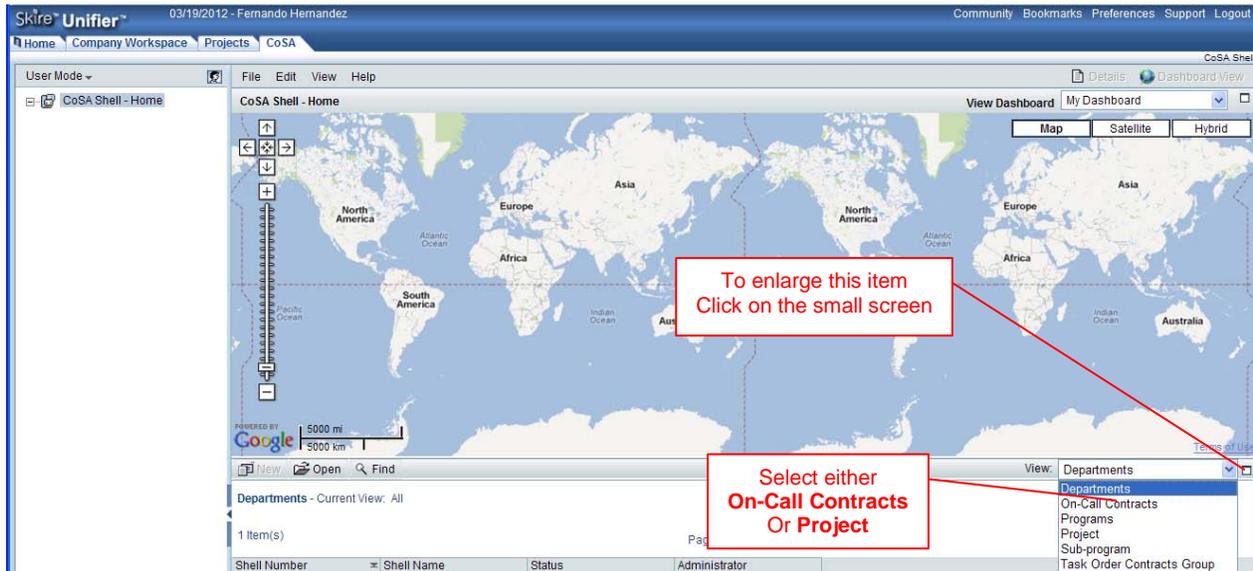
Project Specific:

Go to your project or from Home tab click on project

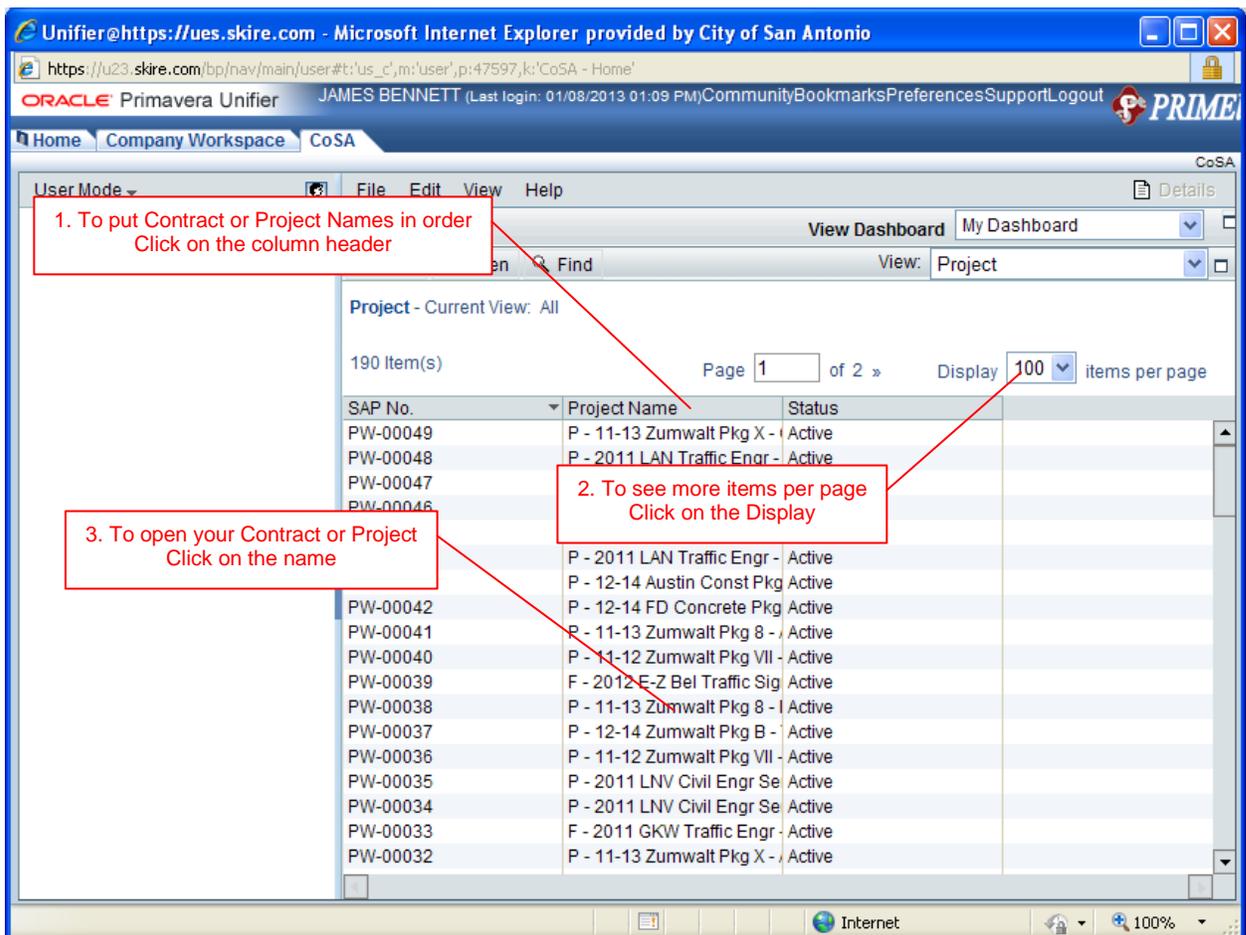
Select Task from the Dashboard

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



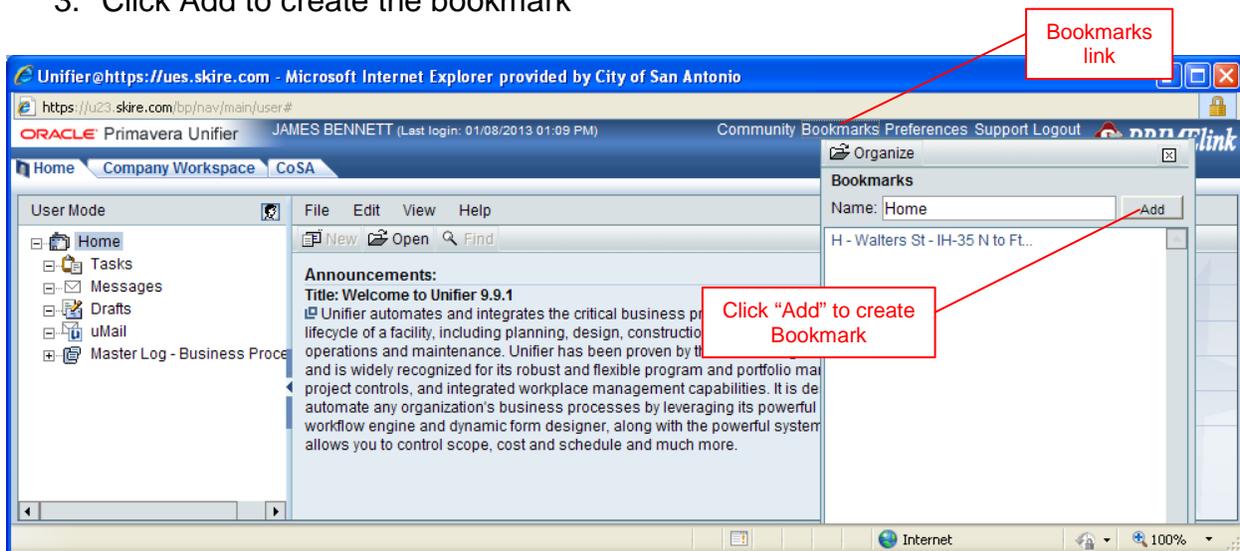
Letters before Project Names and Names stand for the following:

- 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



PRIMELink Forms

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

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

The screenshot displays a web browser window titled "Create New Contract Change Request - Project No. TBE-04 - Microsoft Internet Explorer provided by City of San Antonio". The browser address bar shows a URL from skire.com. The page content is organized into three main sections, each highlighted with a red box and a label:

- Upper Form:** This section is titled "Contract Change Request" and contains a "General" tab. It includes several form fields: "Project Number" (filled with "TBE-04"), "Project Name" (filled with "Walk Through Project"), "Record Number", "Title" (with an asterisk), "Creator" (filled with "Fernando Hernandez"), "Status", "Contract #" (with a "Select..." dropdown), and "Creation Date".
- Action Details:** This section is titled "Create New Contract Change Request" and contains email-related fields: "To...", "Cc...", and "Send For:". There is also a "Task Notes:" field.
- Lower Form:** This section is titled "Standard" and shows a table with the following columns: "No.", "Item No.", "Spec No.", "Item Description", "Price", "Quantity", "Amount", and "PO". The table currently displays "0 Item(s)". Below the table, there are buttons for "Add", "Copy", "Import", "Remove", "Grid", and "Find". A "Total Amount: \$ 0.00" is displayed at the bottom right of this section.

At the bottom of the browser window, there are links for "Attachments (0)", "Linked Records (0)", "General Comments", and "Linked Mail (0)". The browser's status bar shows "Internet" and a zoom level of "105%".

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 shown 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.

Contract Change Request - AM-09 Traffic Control Exhibits-ATT ROW staking-Add - Proj...

https://u23.skire.com/bp/process/task/open?task_id=17183565&parent_id=0&viewOnly=0&project_id=515...

File Edit View Actions Help

Accept Task Decline Task Close Window

Contract Change Requ... Contract Change Request

General

Project Number: 40-00047 Project Name: H - Broadway Corridor - Phase III A

Record Number: CCR-0000004 Status: Commitment_Pending

Title: AM-09 Traffic Control Exhibits-ATT ROW Contract #: 4600008650

Creator: CLAUDIA VALLES-TOVAR Creation Date: 12/19/2012 02:23 PM Local (GMT-6)

Type Contract: Vendor Name:

Task Details

If you received a Task
You must either click on
Accept Task or Decline Task

Create New Contract Change Request - Project

https://us16.skire.com/bp/process/new?wfTemplate_id=4...

File Edit View Actions Help

Send Save Spelling.. Add Attachment Discussion Close Window

Contract Change Requ... Contract Change Request

Workflow Actions -Select-

Click here to expand upper form

Read-only field

Required field

Picker

General

Project Number: TBE-04 Project Name: Walk Through Project

Record Number: Title: *

Contract #: *

Creator: Fernando Hernandez Creation Date:

Vendor Name:

Agency: -Select- *

Change Category: -Select- *

Change to Contract Cost: 0.00 Change to Calendar Days: *

Description Of Change

Description of Change: *

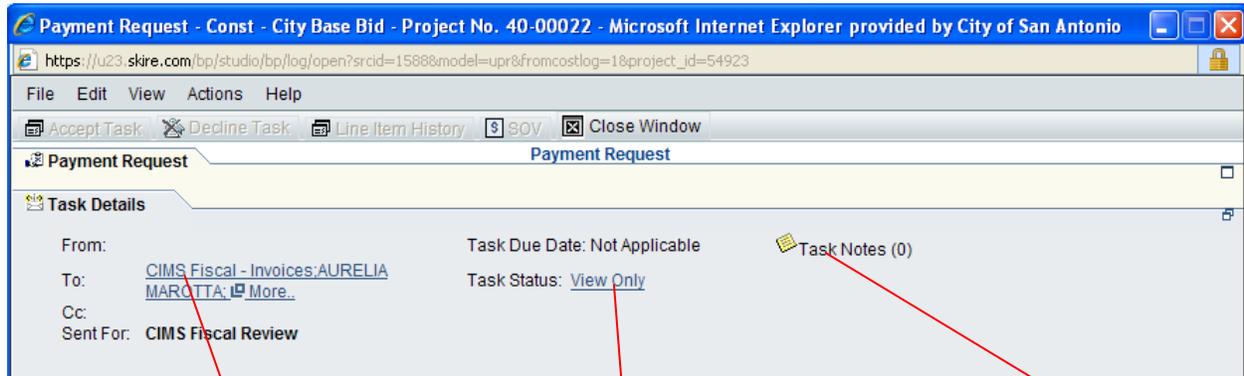
Justification for Proposed Change:

Editable fields

If Workflow Actions is shown
an input is required to send
your item to the next step

Action Details

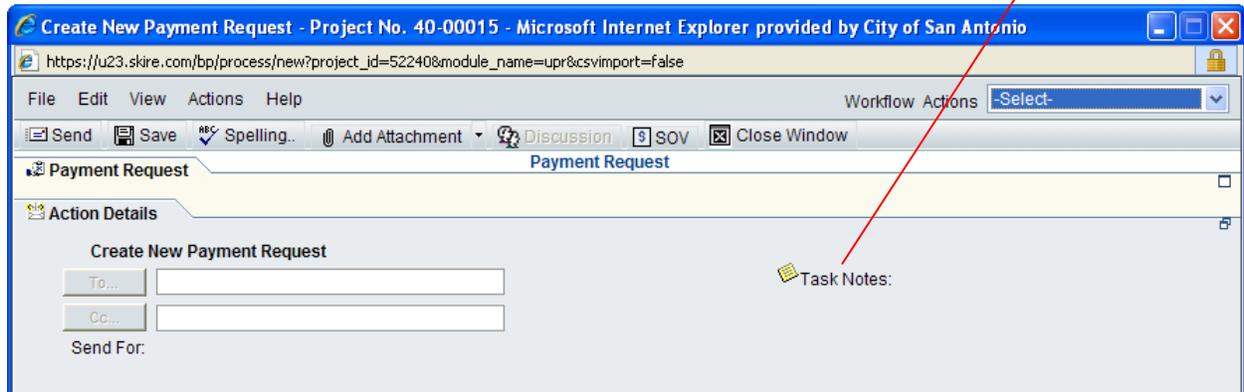
An action detail shows that the task will be assigned to in the next workflow step, who it will be emailed to and workflow status.



Depending on the setup, the To and Cc boxes will auto-populate

Task Status: Click on View Only to see where the item is in the workflow

Task Notes apply only to the next step and are not stored with the permanent record



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.

The screenshot displays a software interface with the following components:

- Action Details:** Includes a link "(Click here to view latest content)", "To..." and "Cc..." input fields, and a "Send For:" label.
- Standard:** Shows "Current View: All", "Show Currency in: Transaction Currency", and "1 Item(s)".
- Table:** A table with columns: No., Item No., Spec No., Item Description, UM, Unit Price, Quantity, Amount, and PO. The first row contains: 001, 5, (blank), Additional Services, LS, 50,000.00, 1, 50,000.00, and (blank).
- Toolbar:** Contains buttons for "Add", "Copy", "Import", "Remove", "Grid", and "Find". A "Total Amount: \$ 50,000.00" is displayed on the right.
- Bottom Panel:** Includes links for "Attachments (0)", "Linked Records (0)", "General Comments", and "Linked Mail (0)".

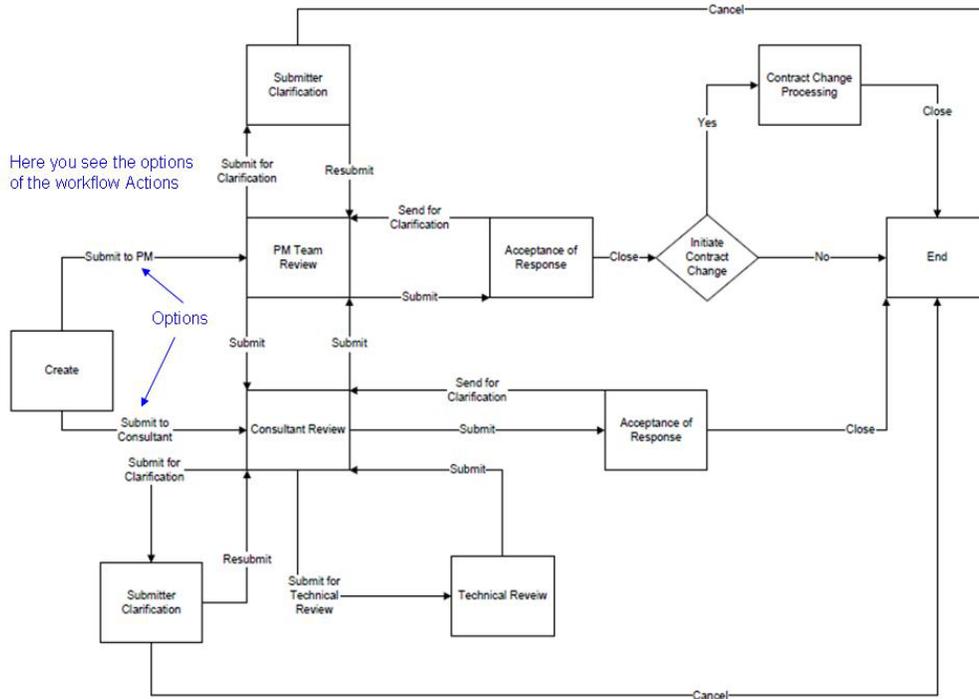
Four red callout boxes provide instructions:

- "Double click to view/edit this line of information" points to the "Item No." cell (5).
- "Click to add other lines of information" points to the "Add" button.
- "Click to view Attachments" points to the "Attachments (0)" link.
- "Click to add/view General Comments" points to the "General Comments" link.

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

