

COSA PRIMELink **Version 19.12 Notes**

Date: 2/26/2020

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PRIMELink Helpdesk

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Section 1 – Overview

1.1 Summary

This document highlights the key changes regarding the upcoming upgrade. This upgrade will significantly impact the user interface, i.e., forms and layout. Oracle will be upgrading CoSA PRIMELink to Version 19.12 starting the night of Wednesday, February 26, 2020. The changes to the system will be effective on Thursday, February 27, 2020.

Section 2 – Forms

2.1 The Classic View that is typically used to display forms will no longer be supported in Version 19.12. Section 2.2 shows the Payment Request in the Classic View. The different sections of forms will be redefined in the upgrade.

2.2 Payment Request in the Classic View.

File Edit View Actions Help

Accept Task Decline Task Line Item History SOV Close Window

Payment Request Payment Request

General **Upper Form**

Project ID: 26-00601 Project Name: K - Apache Creek (19th St. to San Jacinto)

Invoice Summary

Reference Commit: 4500354867-3 Period To: 06/30/2015

Task Details **Action Details**

From: Task Due Date: Not Applicable Task Notes (0)

To: Project Team Approvers: BILL PENNELL; Task Status: View Only

Cc:

Sent For: Project Team Review

Invoice Request **Detail Form**

Current View: All Show Currency in: Transaction Currency

2 Item(s) Page 1 of 1 Display 100 Items Per Page

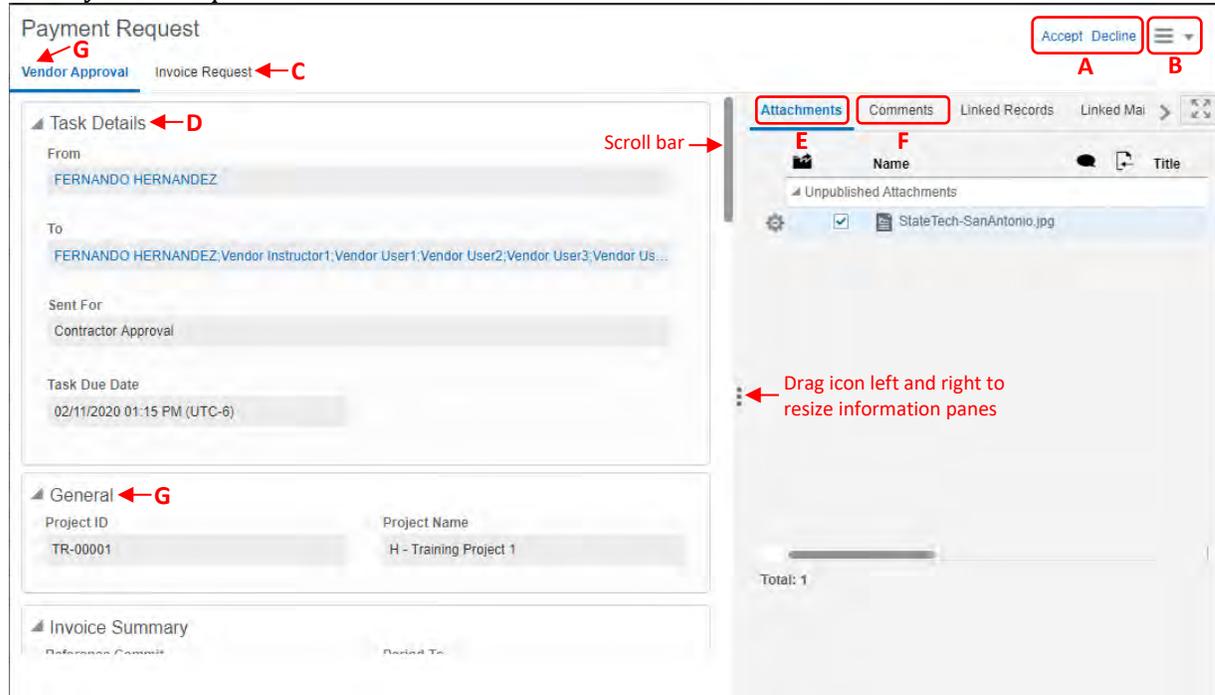
No.	Spec	Item Description	Scheduled Value	Contract Quantity	Previous Quantity	This Quantity	Total Quantity	Current MSOS
001		Design	\$239,203.00	239,203	223,359.09	5,210.62	228,569.71	\$0.
002		Project Management	\$20,169.00	20,169	13,401.55	312.63	13,714.18	\$0.

Find Total Amount: \$5,523.25

Attachments (2) Linked Records (0) General Comments Linked Mail (0)

2.3 After the upgrade the forms will be displayed in the Standard View. Section 2.4 shows the Payment Request in Standard View. Note the new placement of the Upper Form, Action Details, and Detail Form.

2.4 Payment Request in the Standard View.



- A. Accept and Decline hyperlinks replace former Accept Task and Decline Task buttons.
- B. Menu Options replaces former File menu. Click on the icon to Undo Accept Task, Add Assignees, Print, etc.
- C. The placement of the Detail Form moved. Click on the tab to display the Detail Form.
- D. The placement of the Task Details moved. Users can view who sender/recipient and due date.
- E. Click on Attachments hyperlink to view record attachments.
- F. Click on Comments hyperlink to view and add comments.
- G. The placement of the Upper Form moved. Use the scroll bar to view more information.

Section 3 – Sending Tasks

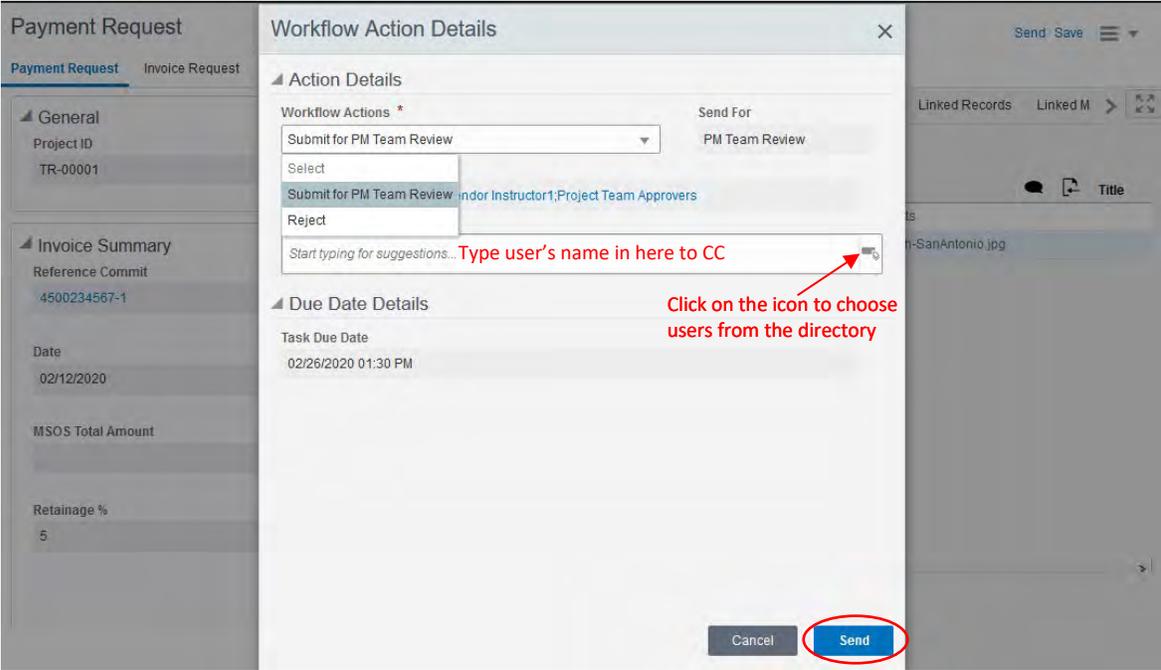
3.1 The Workflow Actions and Send button will change with this upgrade. Once users have accepted the task, they will need to click on **Send** on the top right to view the **Workflow Actions**. Clicking on **Save** will make a draft of the record.



3.2 The Workflow Actions will be displayed when users click on Send. Depending on the Business Process, the Workflow Actions will have routing options such as Approve, Reject, Revise and Resubmit, Approved As Noted, etc.

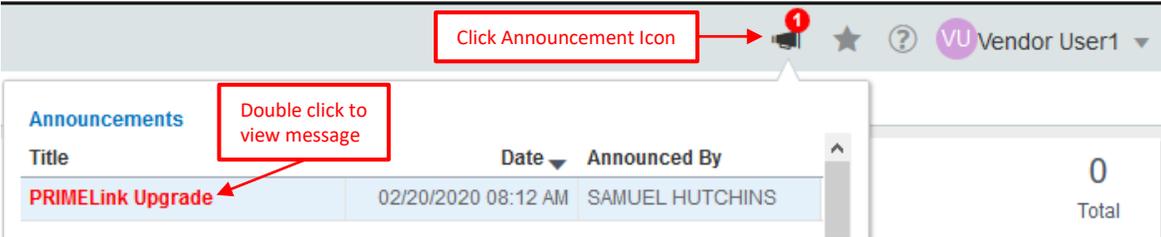
Users will be able to carbon copy (CC) users on the workflow by typing their name or selecting them from the Project Directory. See Figure 3.3 in the following page.

Figure 3.3

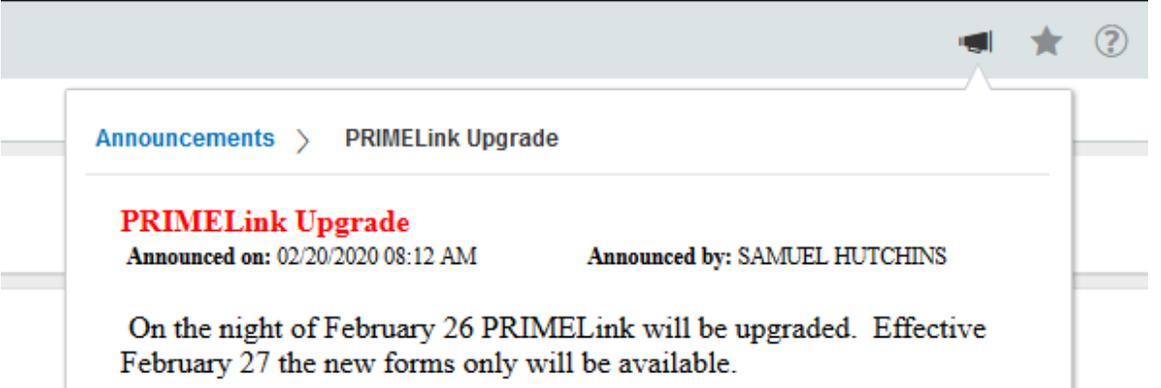


Section 4 – Announcements

4.1 The PRIMELink Helpdesk will use Announcements to transmit pertinent information to all users. Information such as upgrades, outages, and holiday closures will be alerted to all. To view the announcement, users must click on the bullhorn icon.



4.2 Then double click on announcement’s title to view the message.



Section 5 – References

5.1 Additional information and documentation can be found on our website:

<https://www.sanantonio.gov/TCI/Current-Vendor-Resources/COSA-PRIMELink>

5.2 Questions & Assistance Contact

PRIMELink Helpdesk

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