CITY OF SAN ANTONIO
TRANSPORTATION & CAPITAL IMPROVEMENTS

COSA PRIME*Link* General Guide

For The Updated PRIMAVERA UNIFIER

Updated – Feb 6, 2020

PRIME*Link* Helpdesk
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Table of Contents

Configuring Settings for IE, Firefox, Safari and Google

Configuring Settings for Microsoft Internet Explorer

DO NOT USE INTERNET EXPLORER!!!

An updated was done to Internet Explorer in Mid December 2015 and PRIMAVERA Unifier does not work with it.

Configuring Settings for Mozilla Firefox

https://www.mozilla.org/en-US/

1) Open **Mozilla Firefox**.
2) Open **Options**.
3) In the **Options** dialog box:
   a. Select the **Content** tab.
   b. Deselect (**Uncheck**) the **Block pop-up windows** option.
   c. Click **OK** to save your options and close the dialog box. General Setup Tasks

Configuring Settings for Apple Safari

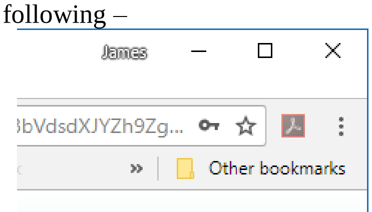
1) Open **Apple Safari**.
2) From the **Settings** dropdown, select **Preferences**.
3) In the **General** dialog box, select **Security**.
4) In the **Web Content** section, deselect (**Uncheck**) **Block pop-up windows**.
5) Close the dialog box.

Configuring Settings for Google Chrome

https://www.google.com/chrome/browser/desktop/index.html

1) In Google click on the Screen with the x in the Address Bar (See below)
2) Change it to "Always allow pop-ups from cosaprimelink-unifier.oracleindustry.com"

If you have already being using Google Chrome,please do the following –

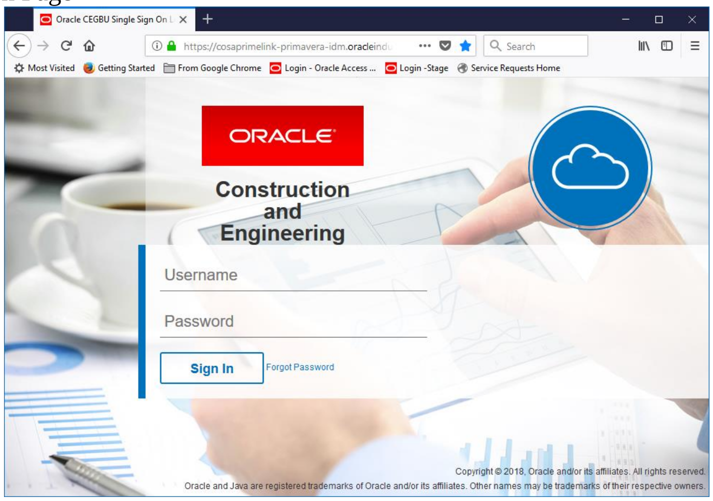


1) Click on the 3 vertical dots in the upper right hand corner
2) Click on Settings, then click on"Privacy and security"
3) Scroll down and find then click on "Content Settings", Scoll down to and click on "Pop-ups"
4) Click on "Add" and input - https://unifier.oraclecloud.com/cosaprime
5) Click on "Add" in the lower right hand corner
6) Go back to Login Screen

Logging into the new ORACLE Access Manager

To login into ORACLE Access Manager, go to https://cosaprimelink-unifier.oracleindustry.com

Main Logon Page



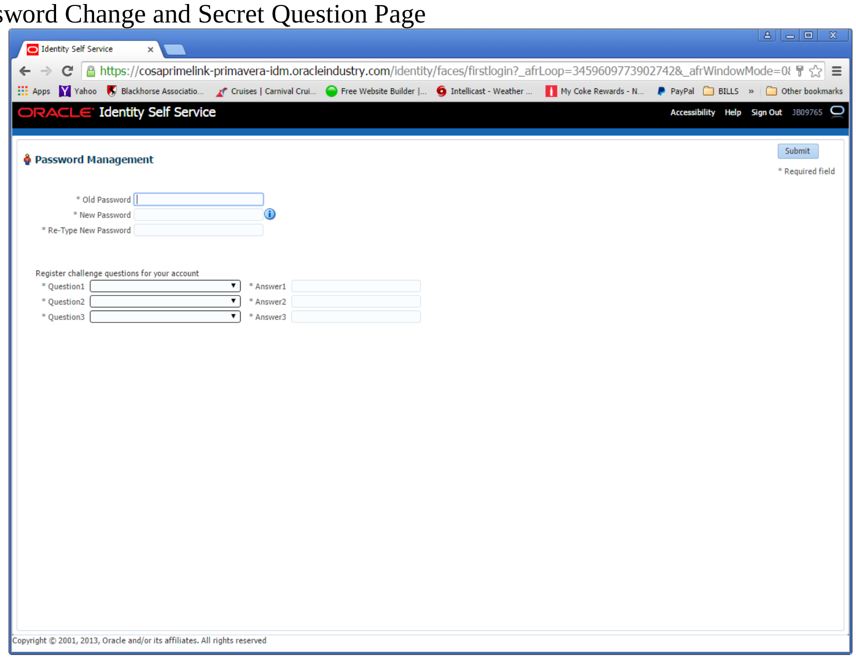
You will enter your username that you used in PRIMELink and
the new password that Oracle or that we sent to you in the email

After you have click on Login, this page will show up.
Please change your password and select and answer the Challenge Questions.

Your old password is the one Oracle or we told you. (NOT YOUR OLD PASSWORD)

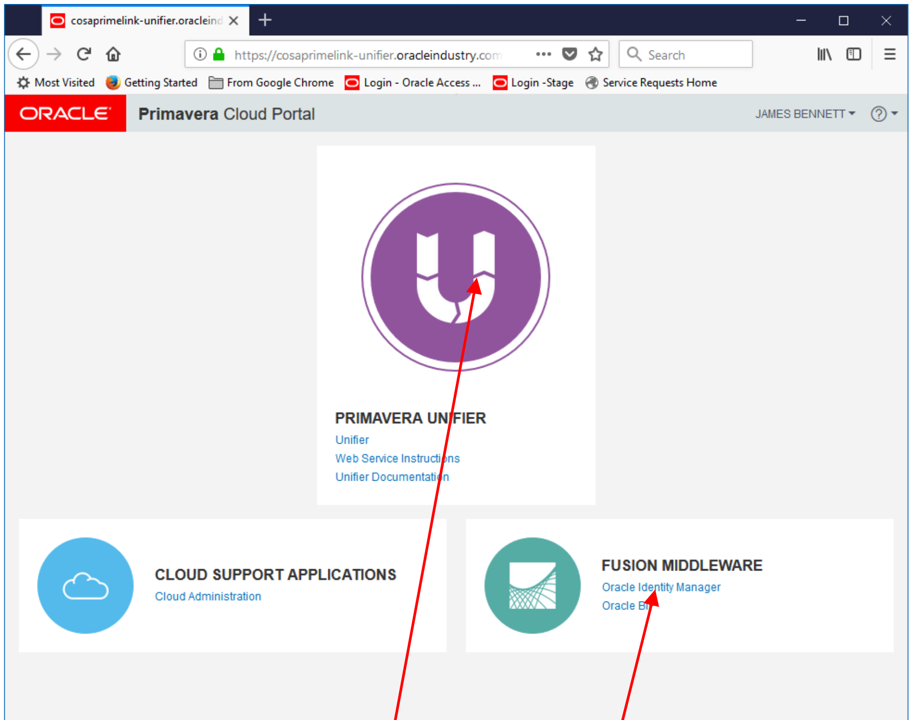
(Passwords should be at least 8 characters long, with at least one capital letter & one special character
[{~!@#$%&*()-_=+;:"’,<.>/?}]

Password Change and Secret Question Page



After you have click on “***Submit***”, this page will show up.

1. To go into **PRIMAVERA UNIFIER**, click on Unifier
2. To change your password or change your proxy, click on **Oracle Identity Manager**



Click this Icon to open ***PRIMAVERA UNIFIER***

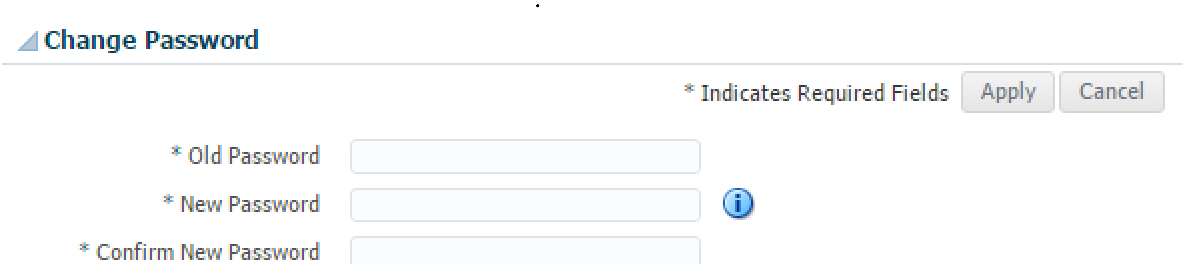
To change user information such as
Name, Email, Password, Challenge Questions & Proxies
Click on the ***Oracle Identity Manager***

If you need to change your Password later

1. To login into ORACLE Access Manager
2. Click on Oracle Identity Manager

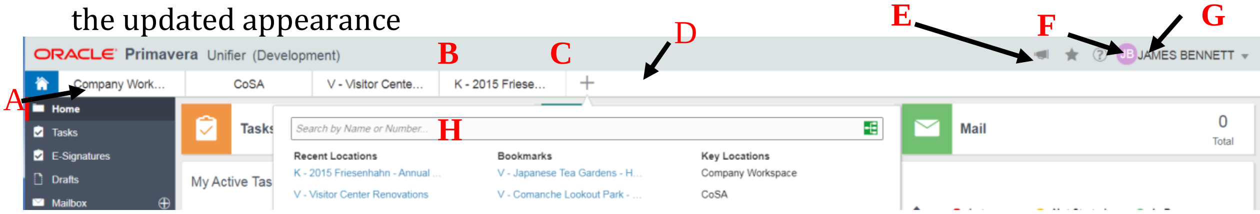
- 1. Click on My Information,
- 2. then click on Change Password
- 3. Input your current password in Old Password and input your new password twice then click on “Apply”

.



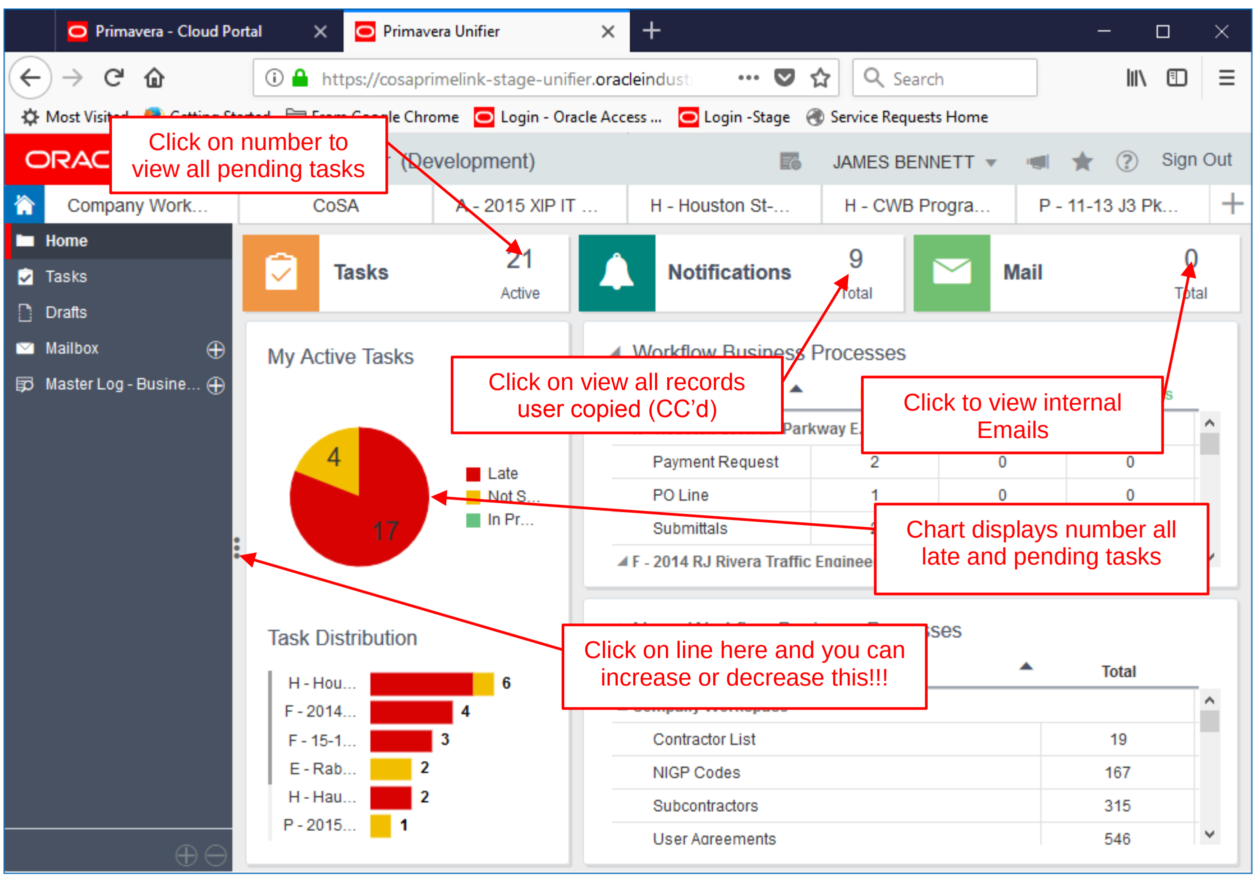
Navigation, Layout and Upgrades to PRIMELink

1. The navigation remains the same. It will continue to use tabs for each project and on-call contract. The Home Tab will always remain on the upper left corner. Users can continue to use the search bar to locate their projects and on-call contracts. Below is a screenshot of the updated appearance

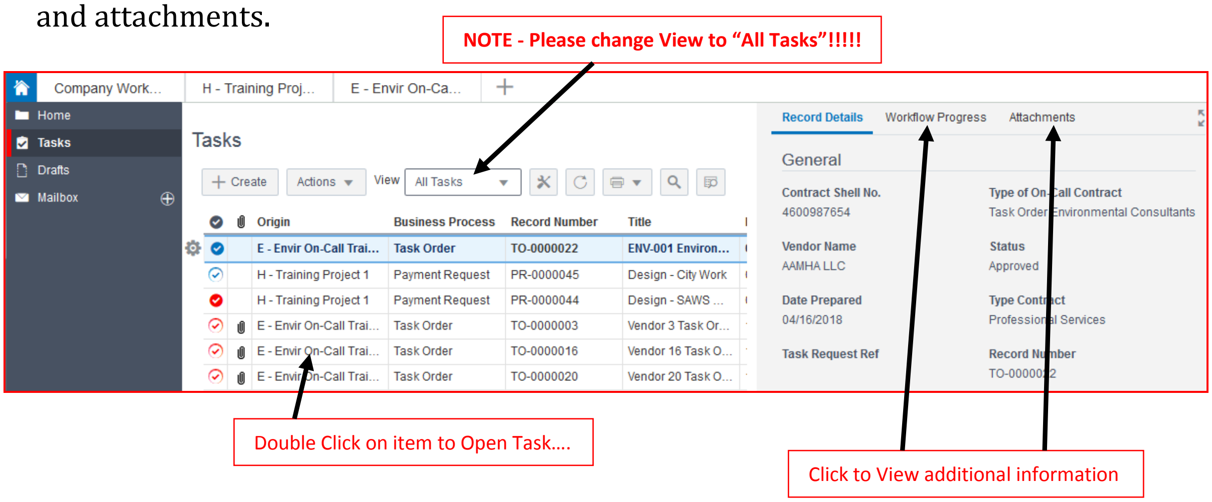


A. Home Tab (Cannot be removed)
B. Tab 1
C. Tab 2
D. Icon to add tabs and display search bar
E. REMOVED - Button to switch between new and old interface. Old interface has been removed.
F. Bookmarks
G. Help Menu
H. Search bar

2. The Home Tab will have an updated appearance. Users will continue to access all of their Tasks, notifications, Drafts and Mailbox.

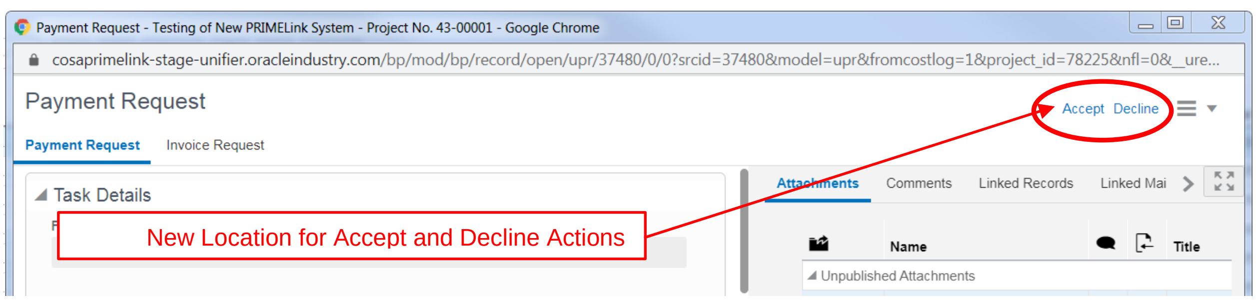


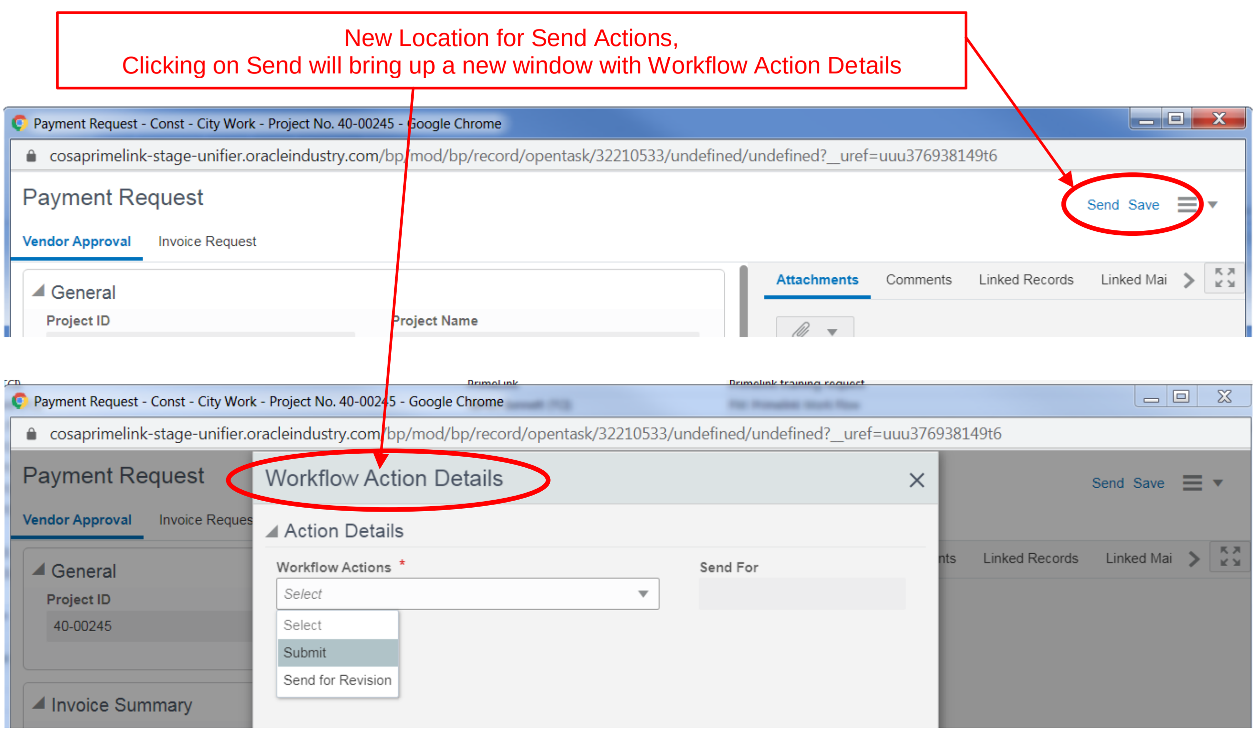
3. The Tasks Log will have a new appearance. The default view is to display tasks received in last 7 days. We highly recommend changing to "All Tasks" to view all outstanding tasks. The section on the right displays additional record information such as workflow progress and attachments.



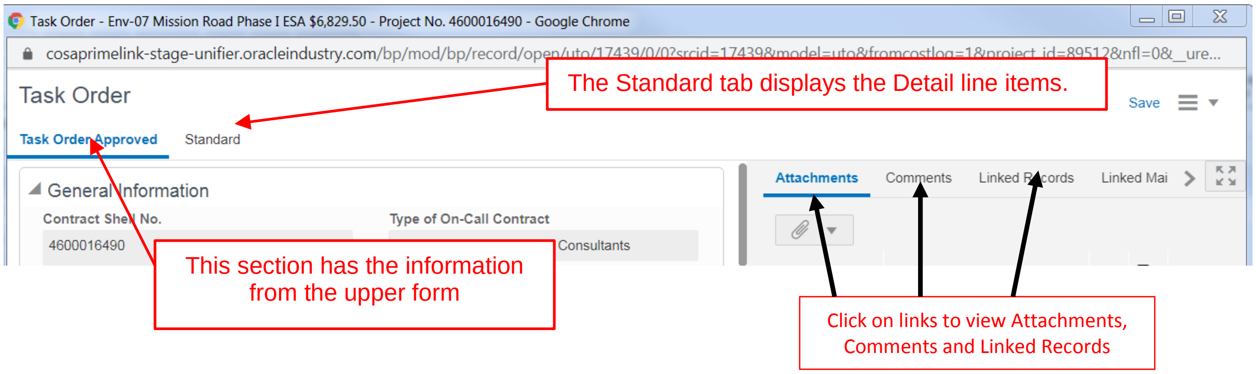
4. The form layout has changed a lot!! The Accept and Decline location moved to the upper right hand corner, and the Send location move to the upper right hand corner too.

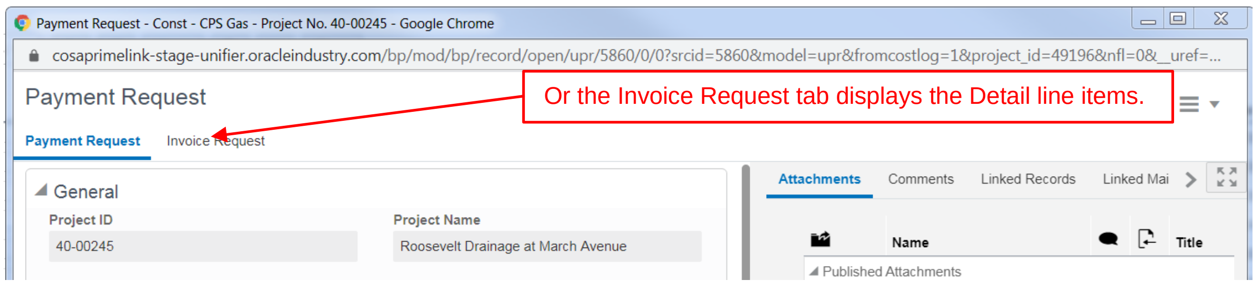
See the following screenshot.



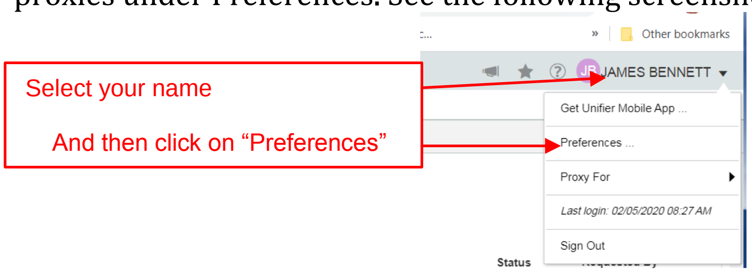


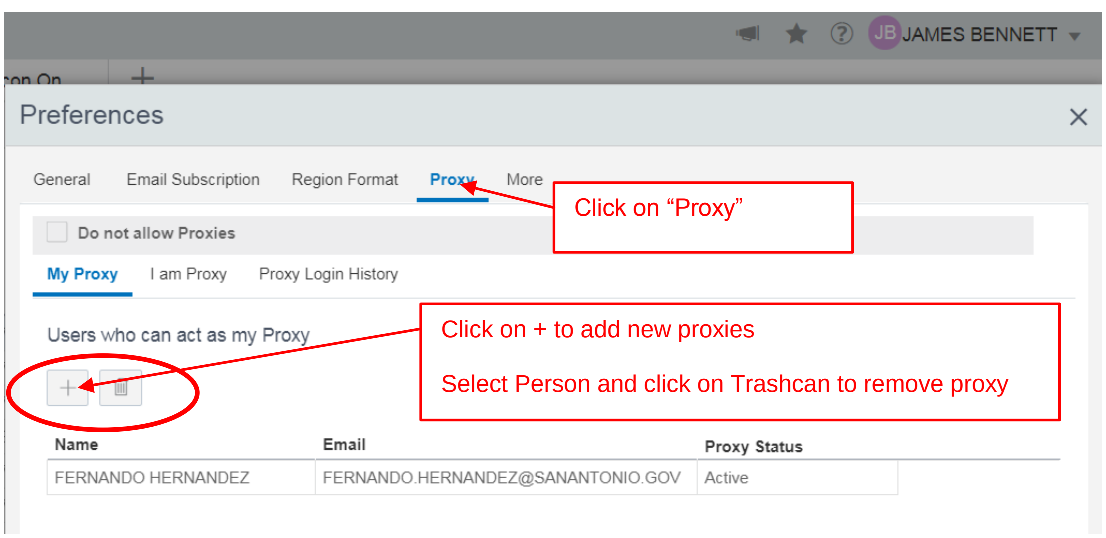
5. Users using new user interface will have a new form when records are closed/completed. The following screenshot shows the new form layout. However, users can switch to the old interface to view the classic form layout. Refer to letter E under Section 3 to switch interface.



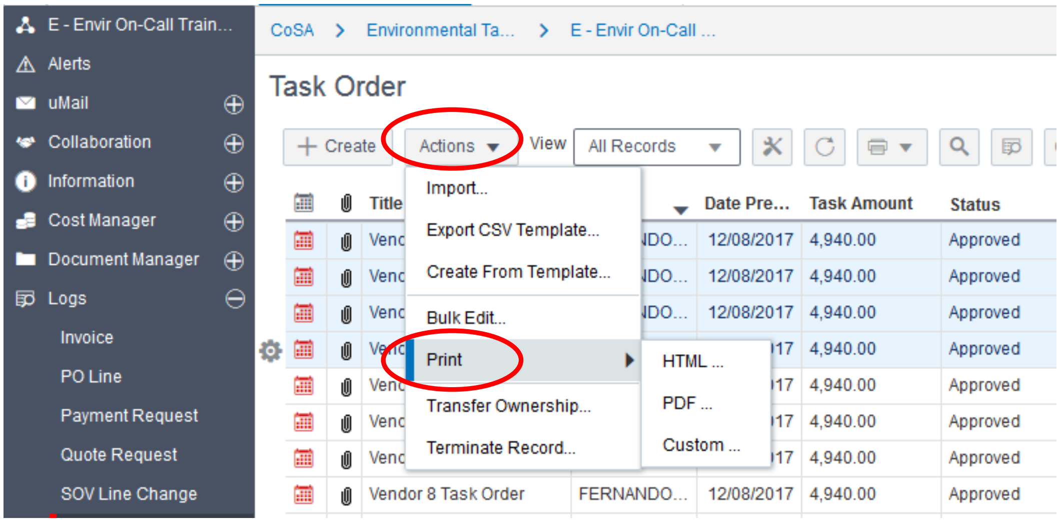


6. A user can have multiple proxies from their respective organization. Users can select their proxies under Preferences. See the following screenshot to setup proxies.

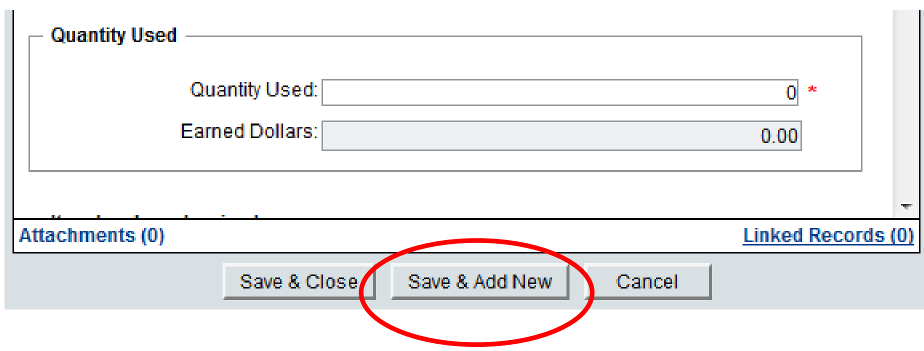




7. Users can print multiple records from the logs into a single file. Users can select multiple records by holding down the Ctrl or Shift key. Under Actions select Print and then select the format (HTML, PDF, etc.) to generate the file.



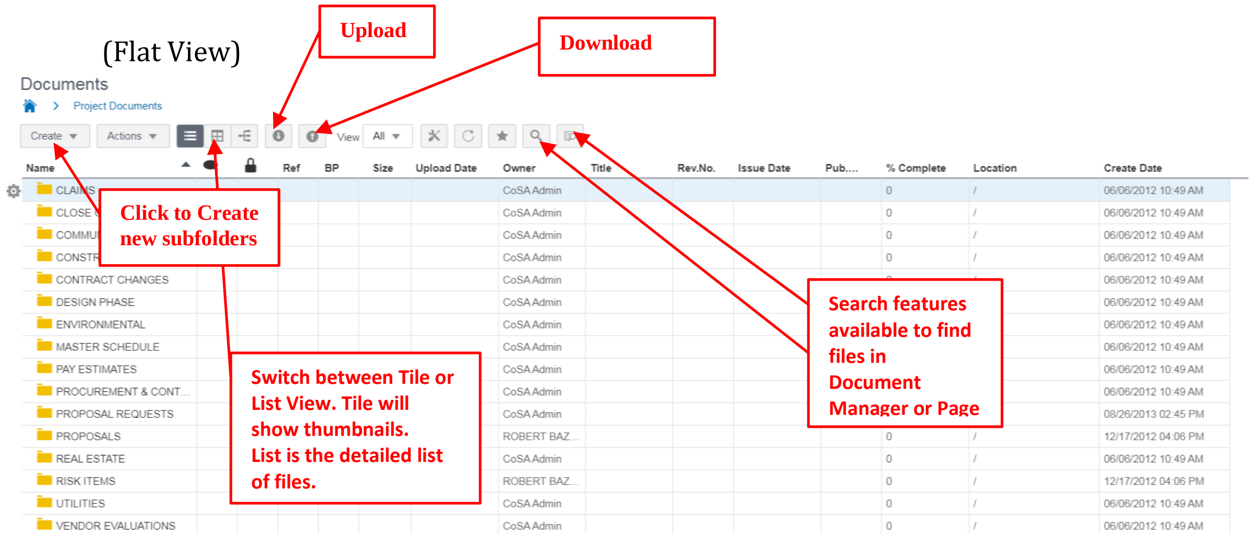
8. When adding line items to Task Orders, Contract Change Requests, etc., you can add additional items without having to close the entry form. Select the “Save & Add New” button to save time when entering line items.



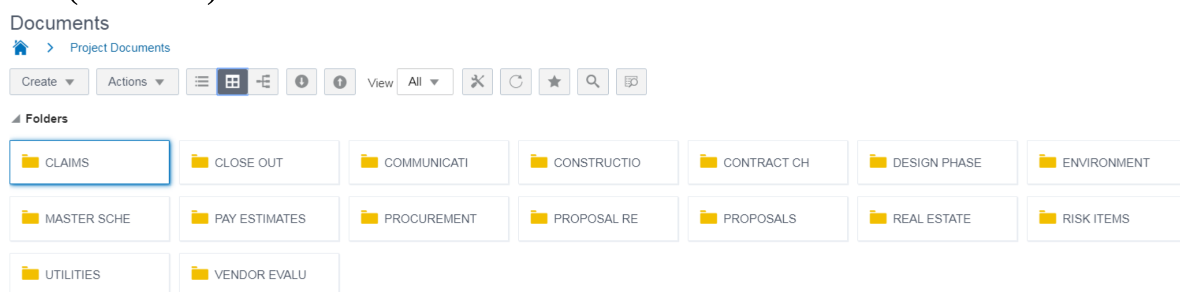
9. The Document Manager has 3 different views in the interface - following is screenshots of the new views – Flat View, Tile View and Tree View

In the Tile View it displays a thumbnail preview of photographs. You can also search for files across all folders in the Document Manager.

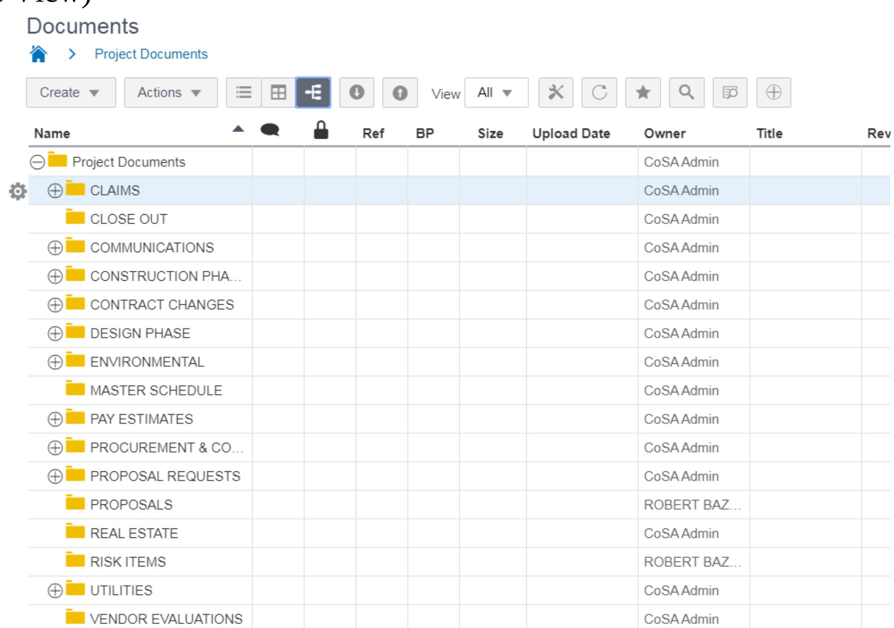
(Flat View)



(Tile View)

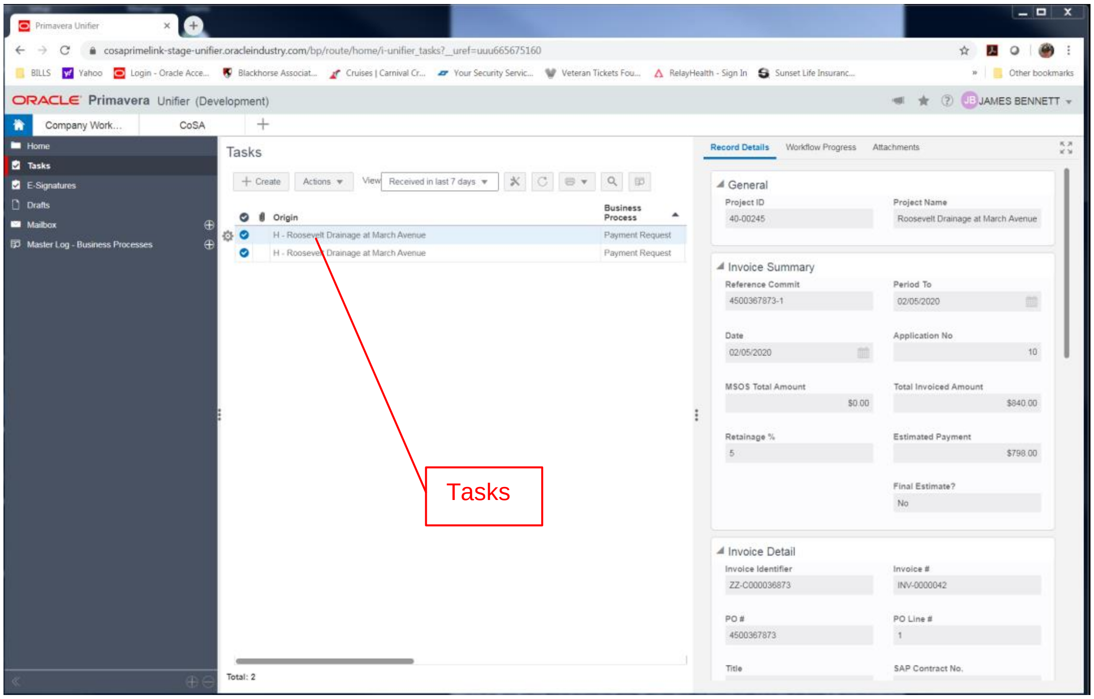


(Tree View)



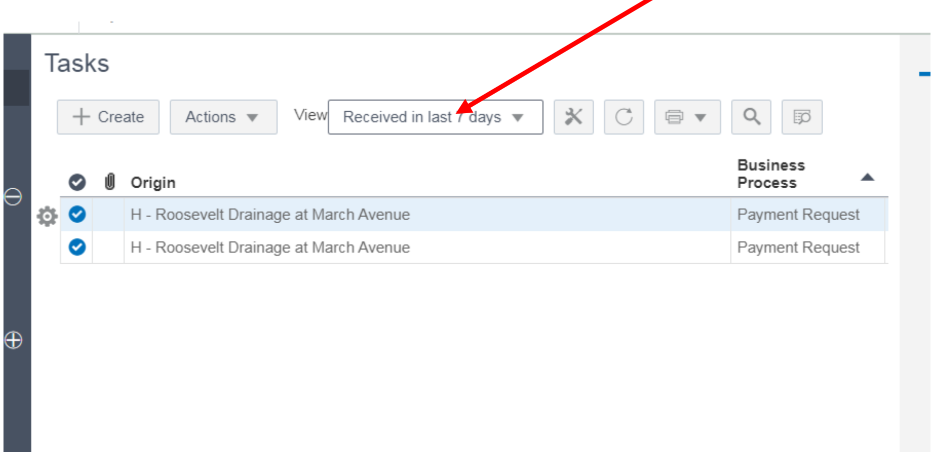
Different Items In PRIMELink

1. 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
- Mailbox: displays internal e-mail messages sent within the system

To View Items that are more than 7 days old you will need to click on the down arrow



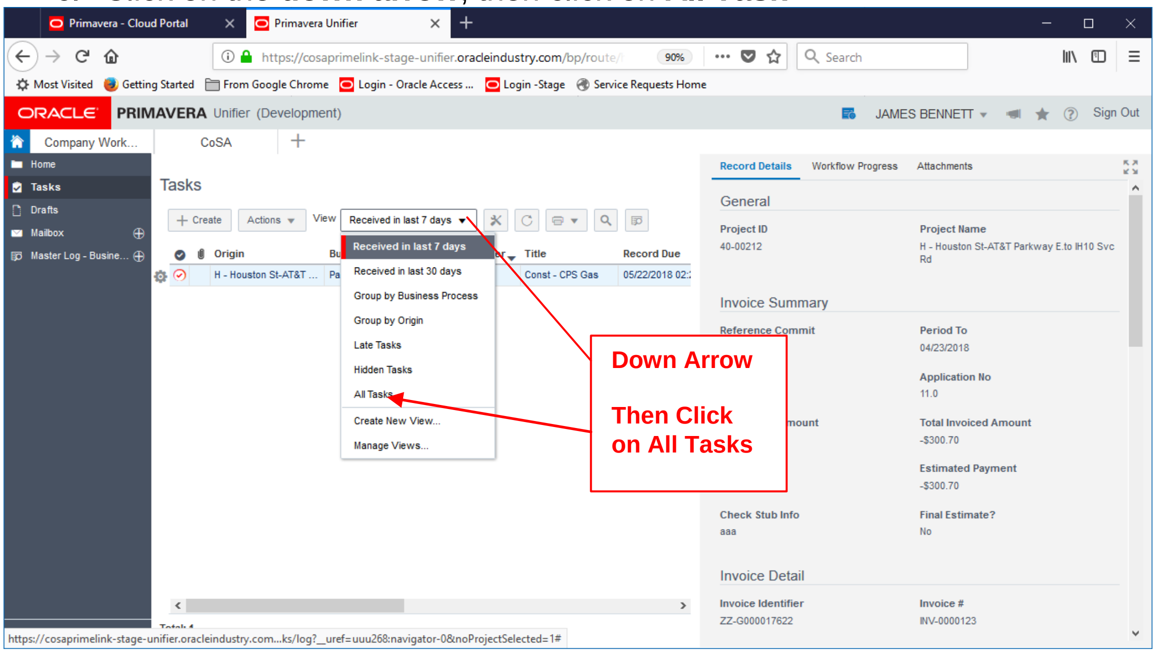
View Pending Tasks

2. <u>To View All Pending Tasks:</u>

a. Click on the **Home** Tab

b. Click on **Task**

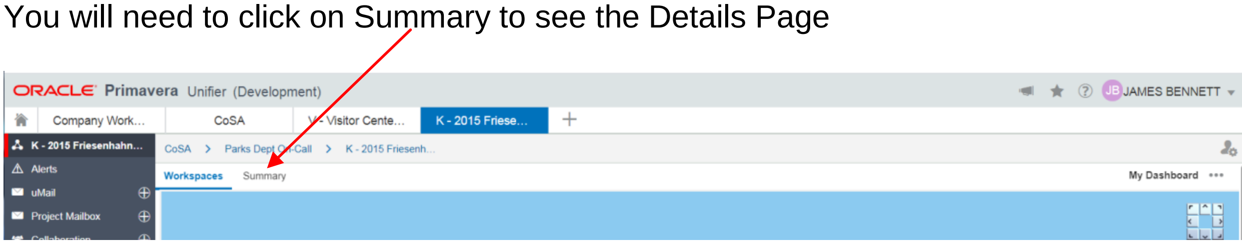
c. Click on the **down arrow**, then click on **All Task**



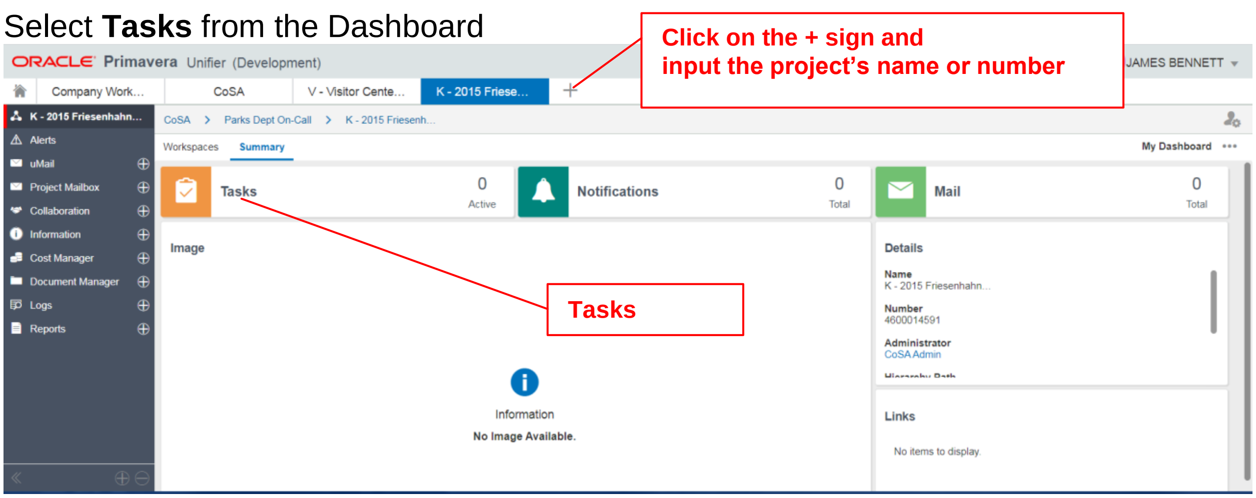
<u>Project Specific:</u>

Go to your project or from Home tab click on the + sign and input your project's name into the search engine and click on it there…

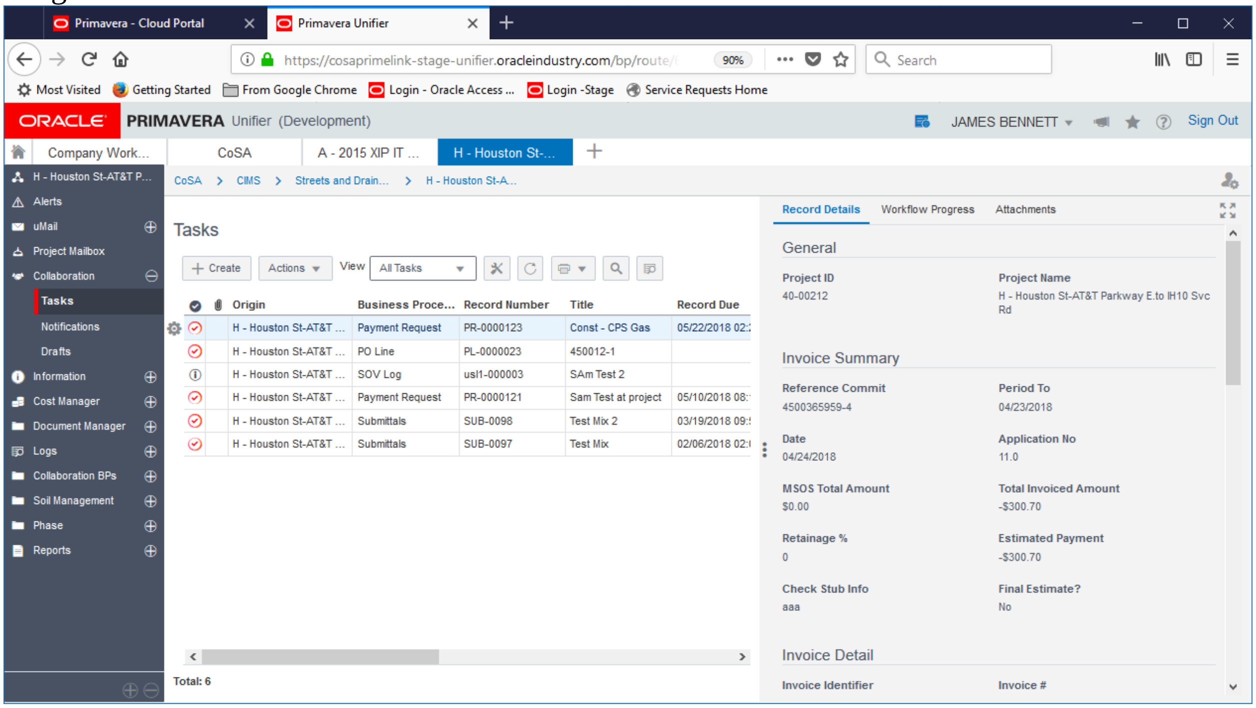
When you click on your project the following will appear –
You will need to click on Summary to see the Details Page



Select **Tasks** from the Dashboard



Pending Tasks

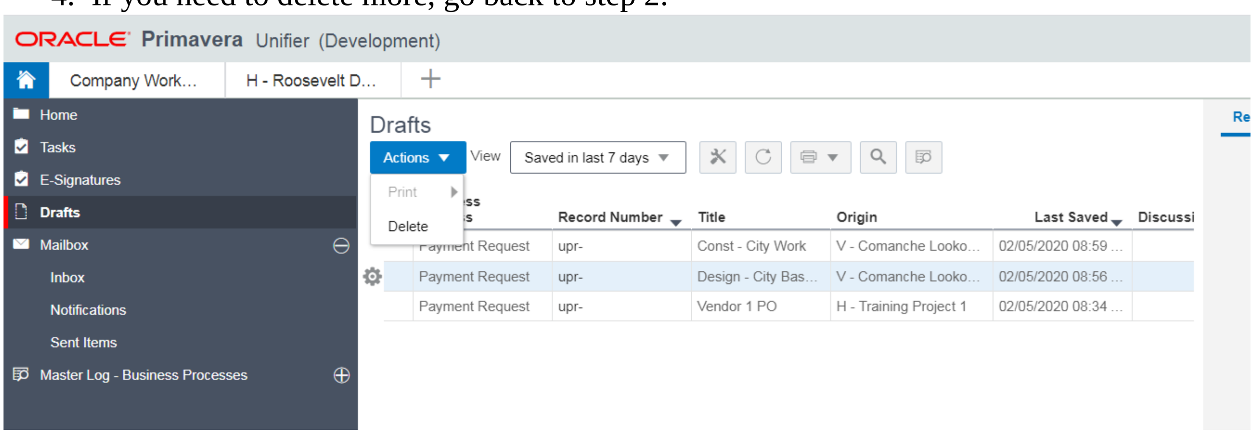


This is where you can use the stuff shown to you on Page 6….

View Draft Records

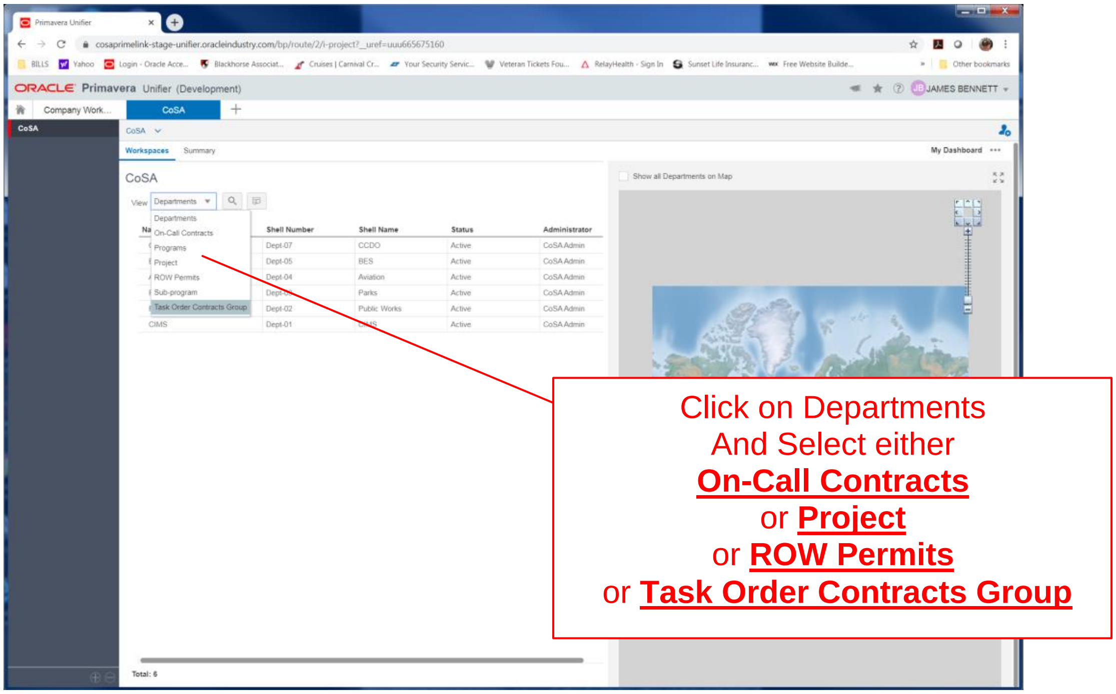
When you start a new item in PRIMELink (Payment Request, RFI, Submittal or other item) and the system drops you out or you have to get out, sometimes the system will store it has a Draft Record. Please keep an eye on this item. You do not want to have a lot of Draft Records. To clear them do the following:

1. On the Home Screen, click on **Draft** in the upper right corner
2. Highlight the ones you want to delete
3. Click on **Actions**, then on **Delete**
4. If you need to delete more, go back to step 2.

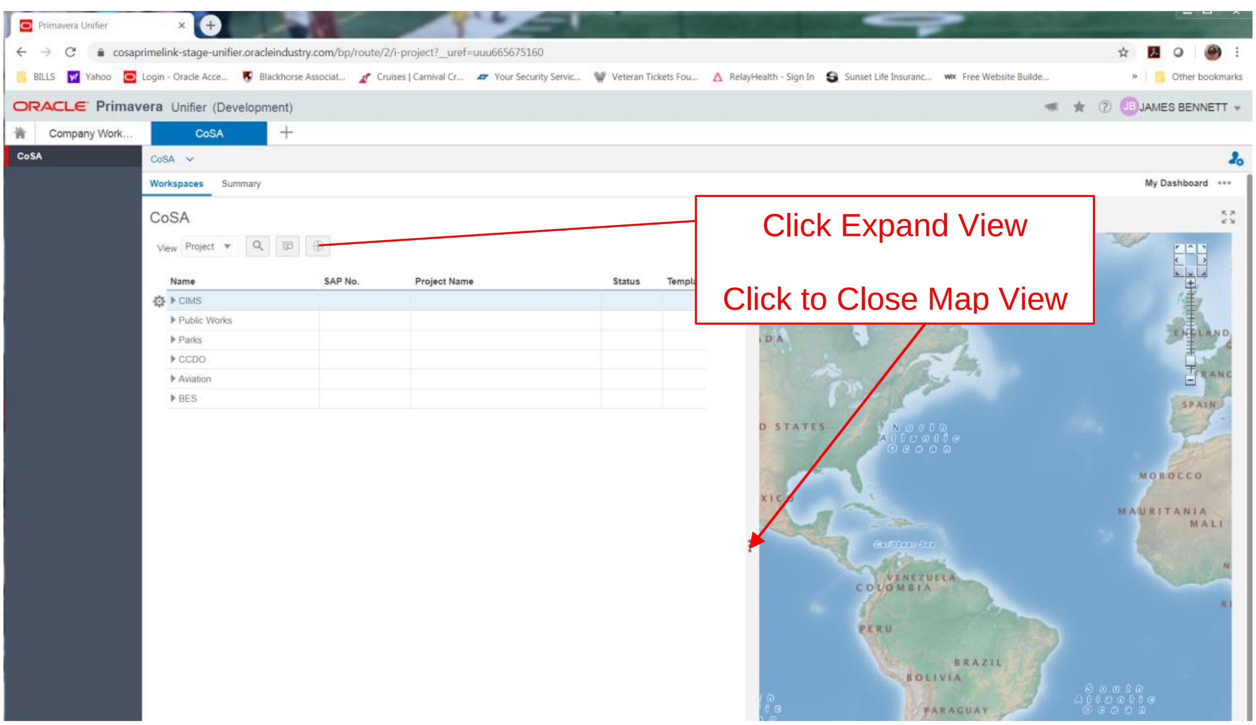


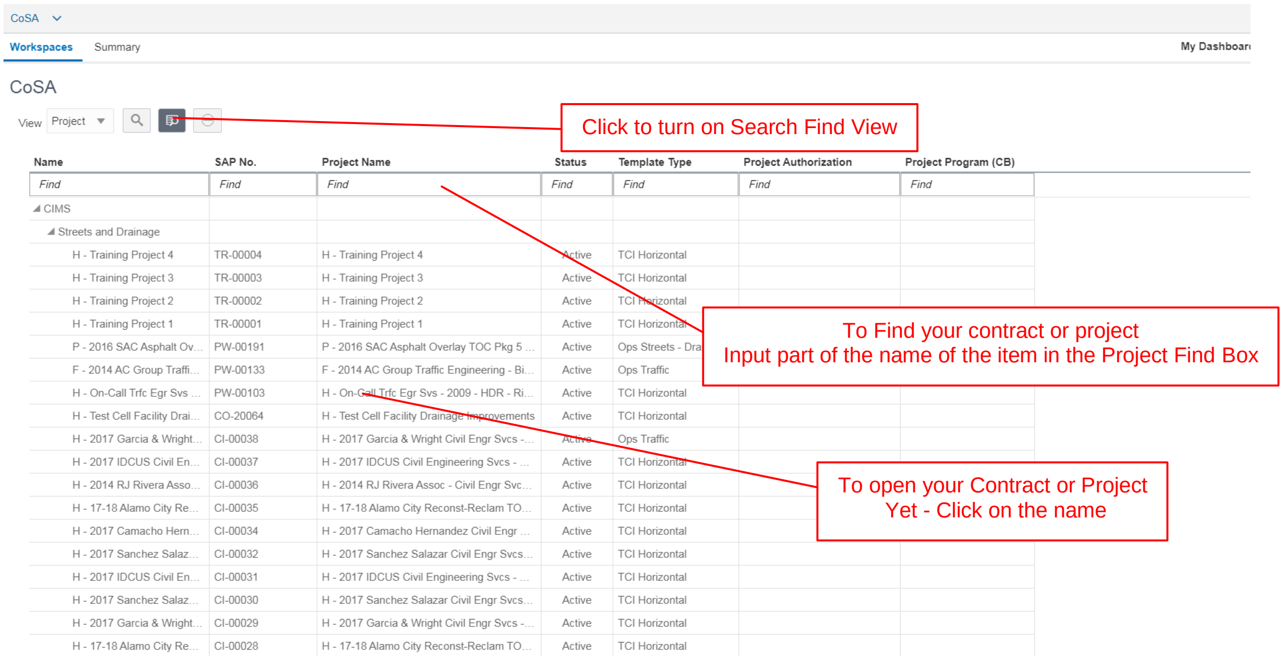
CoSA Tab

The CoSA tab contains all the current On-Call Contracts, Projects, ROW Permits and Task Order Contracts Group.   The new location is on the close to the top left and select either: **On-Call Contracts, Project, ROW Permits or Task Order Contracts Group**.



To find you project – find and click on Project





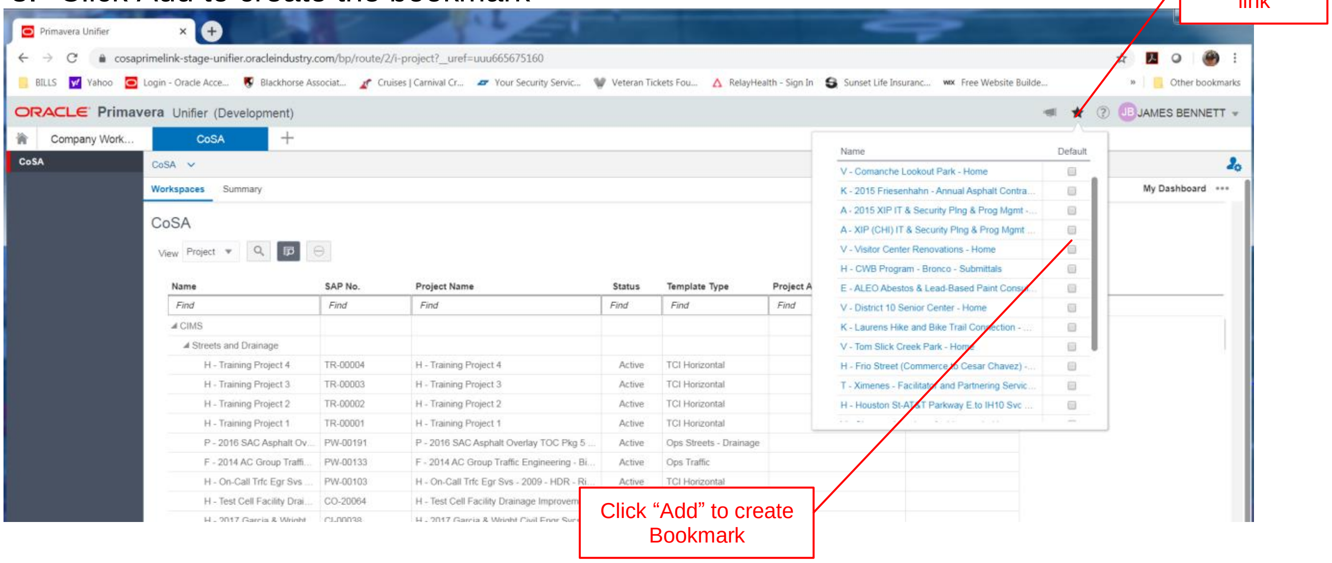
Letters before Project Names stand for the following:

A – Aviation Projects
B – Building and Equipment Services
E – Environmental On-Call Contracts
F – Traffic Management/Operations Projects and On-Call Contracts
H – CIMS and Public Works Horizontal Projects and On-Call Contracts
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

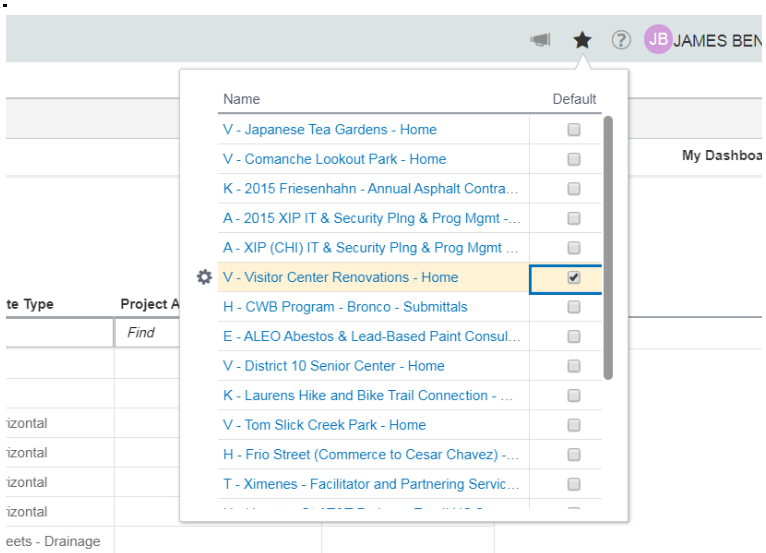
Bookmarks

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

1. Navigate to the desired Project or On-Call Contract
2. Click the Bookmarks Star on the upper left section of the window
3. Click Add to create the bookmark



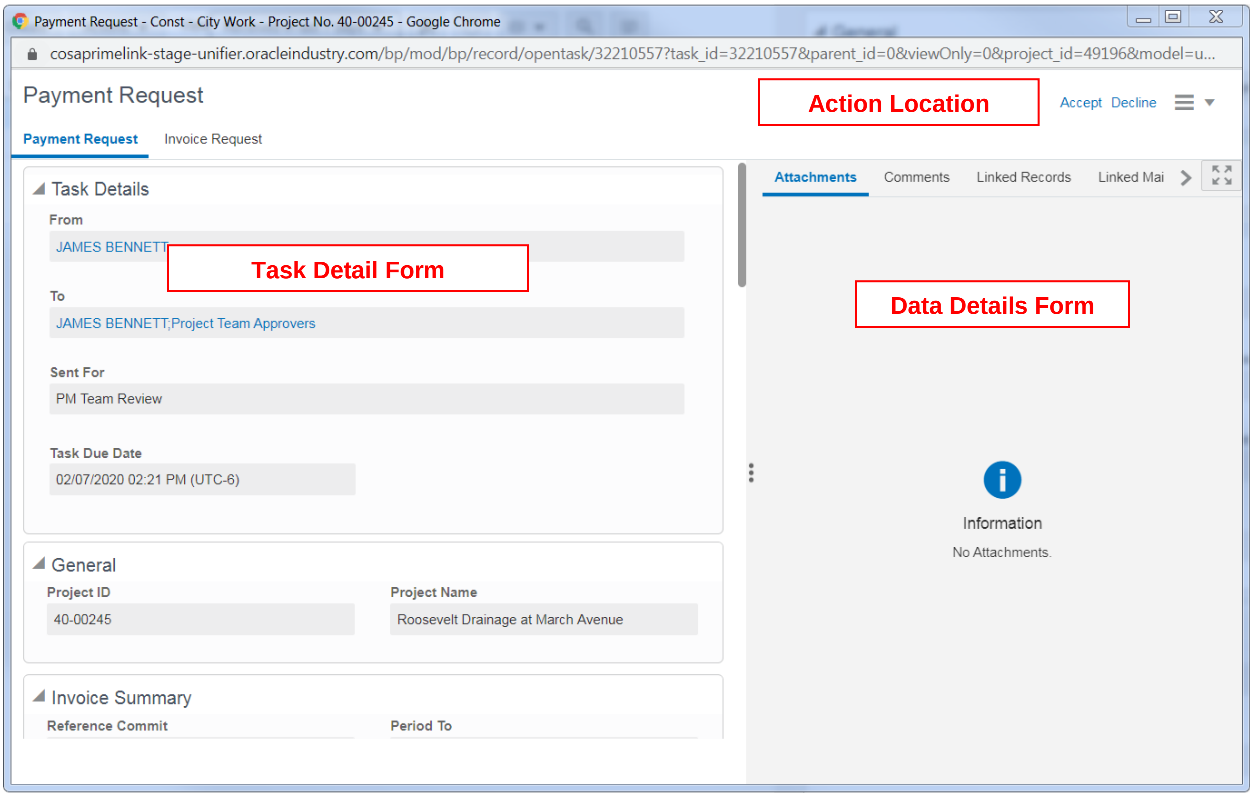
If you want PRIMELink to open at your project, click on Organize then put a Checkmark in the Default Logon block.



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.

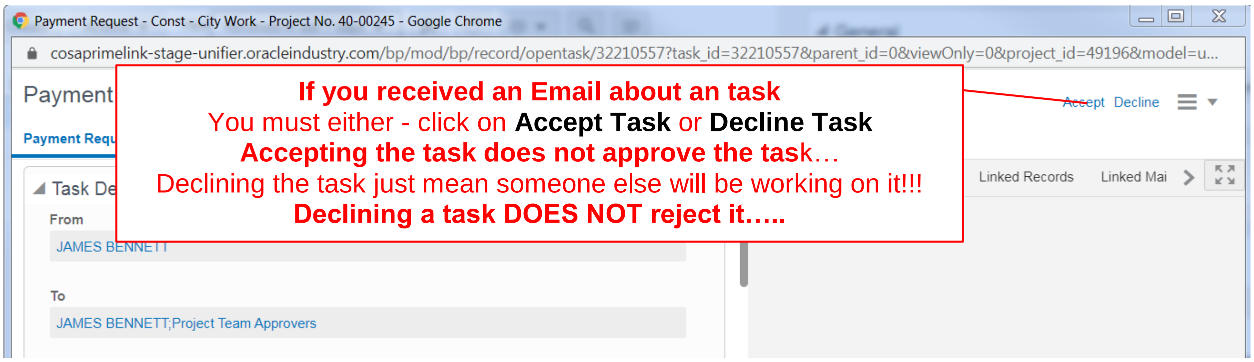
PRIME*Link* forms consist of one or more sections: Task Detail Form, Action Location, and Data Details Form.



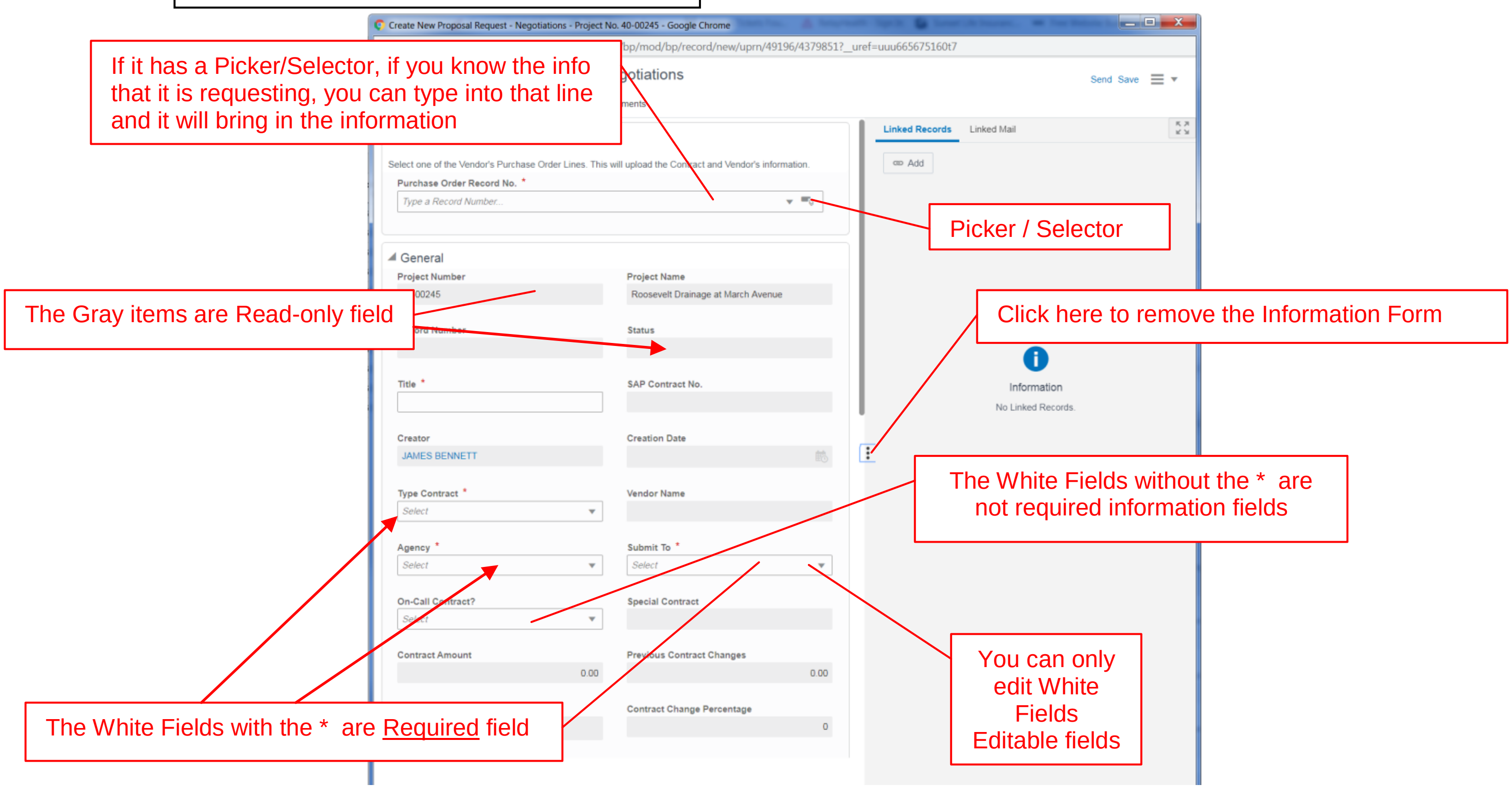
Task Details Form

The Task Details 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.

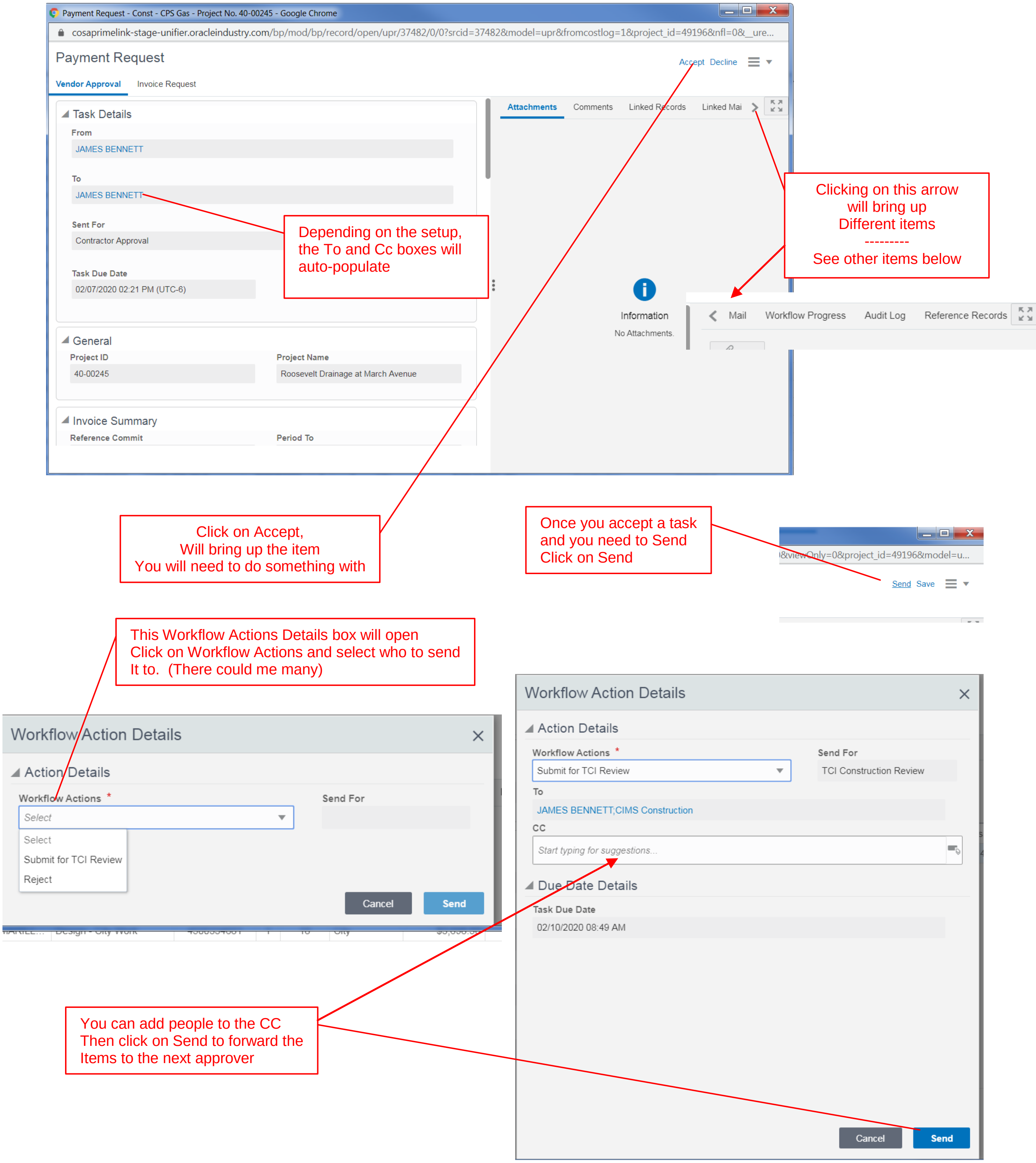


Different items have different forms



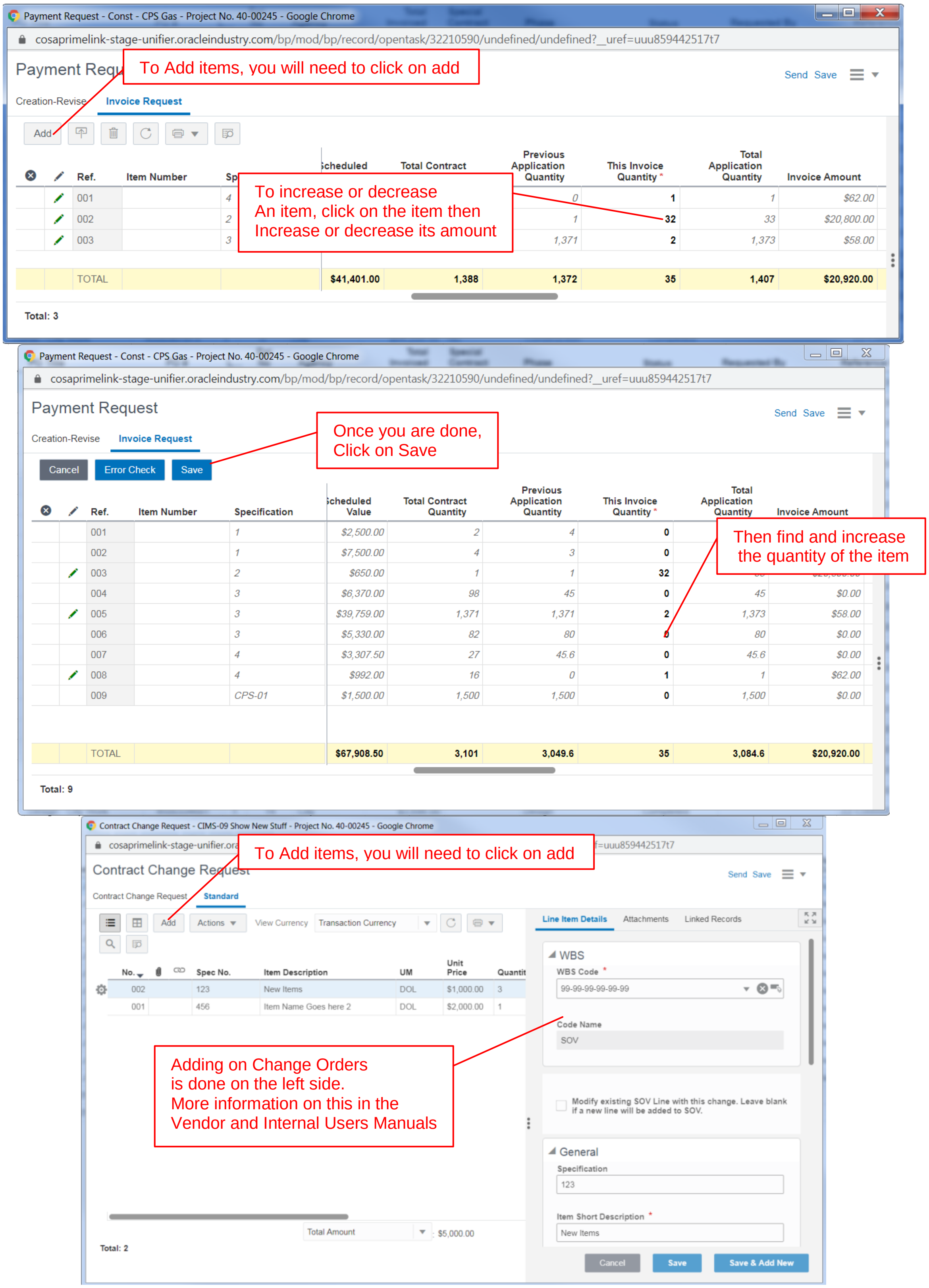
Task Details and Data Details Forms

Task Details and Data Detail will show that the task will be assigned to in the next workflow step, who it will be emailed to and workflow status.



Invoice Request and Standard Data Forms

The Invoice Request and Standard Data Forms contains fiscal information and has the main content of the record, such as line items for a payment request, change order and task orders. The following is an example of a List Items list.



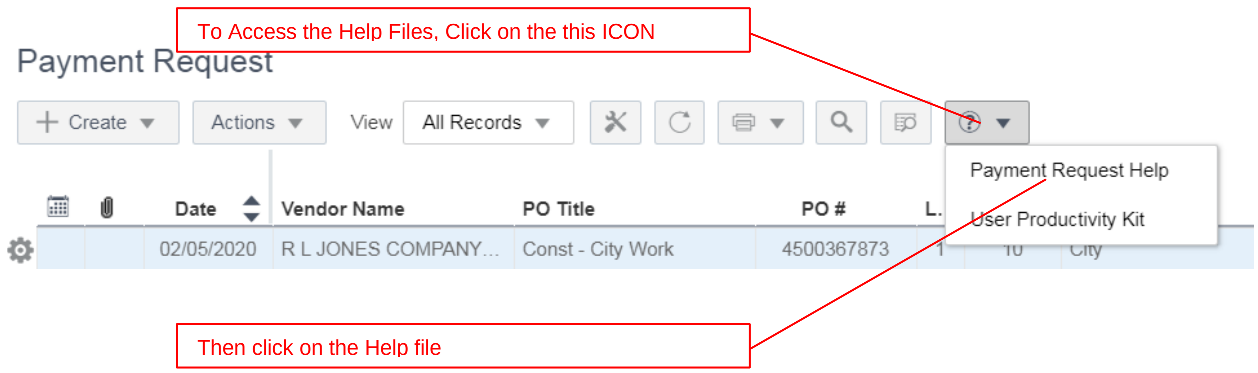
Help Files in PRIMELink

On some items there **Help Files** at the top, to see if there are help files on an item, do the following: (You must be on your project and on the item you want help with) (The User, Admin and Reference Guides are from Oracle and not the PRIMELink Helpdesk these will not help you with your problems)

Task Request Contracts Group Help, Field Work Directive Help, PRN Help, RFIs Help

Are just some of the help files that may have a PDF help file.

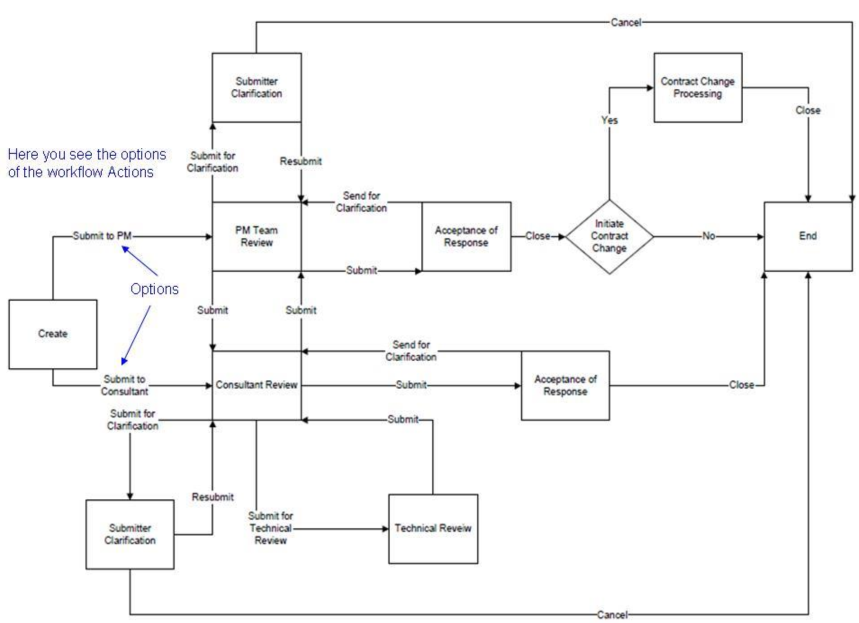
<u>Most do not have a help file yet.</u>



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)



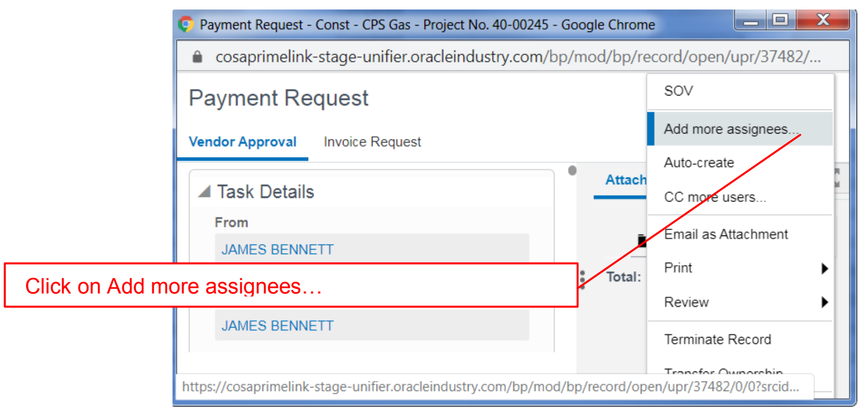
Workflow:

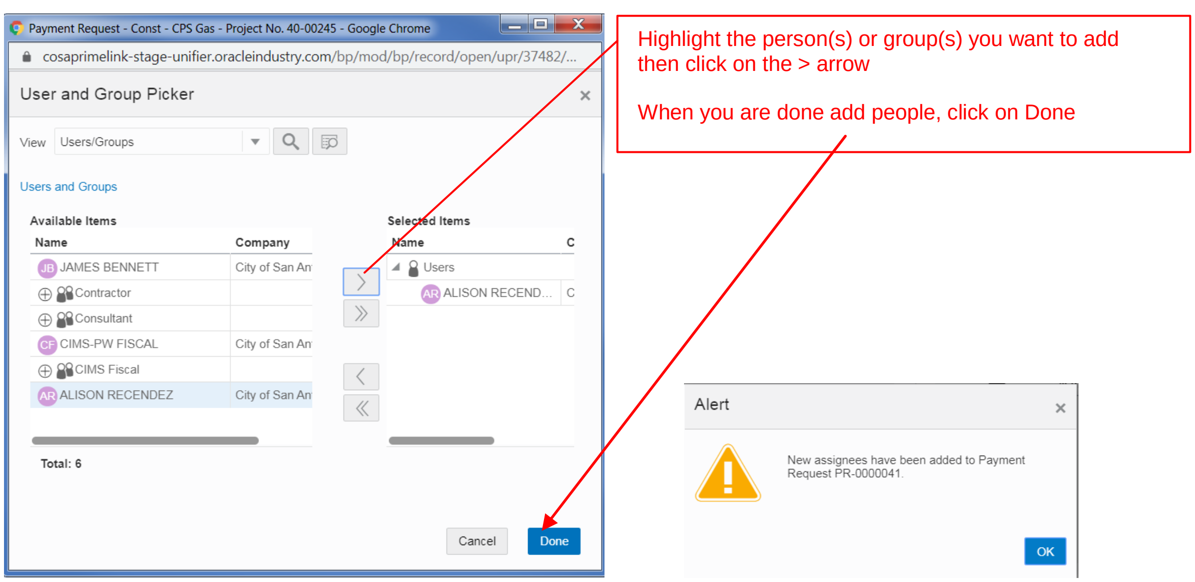
Assign Task in Workflow

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

1. Open the task
2. **Do Not Accepting the task!!**
3. Click on the 3 horz lines
4. Click on “Add more assignees…”
5. Highlight the person(s) or group(s)
6. Click on the > arrow
7. Click Done

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

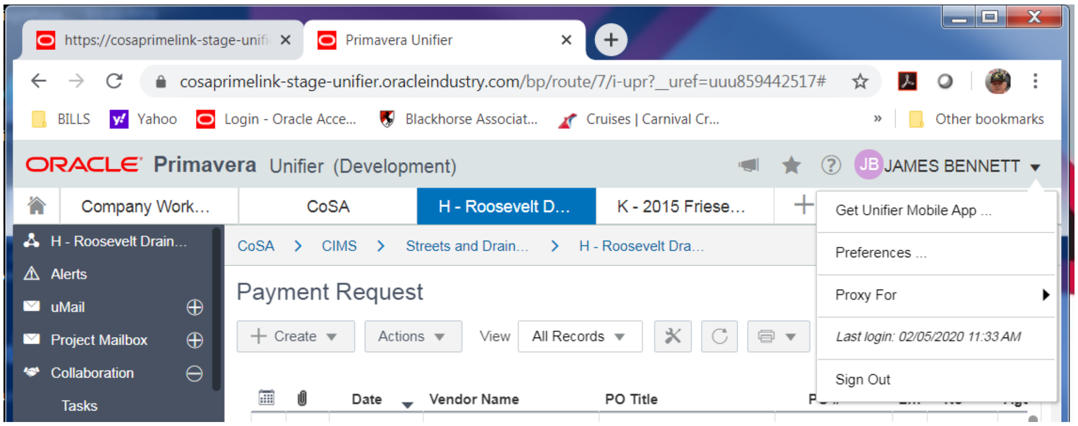




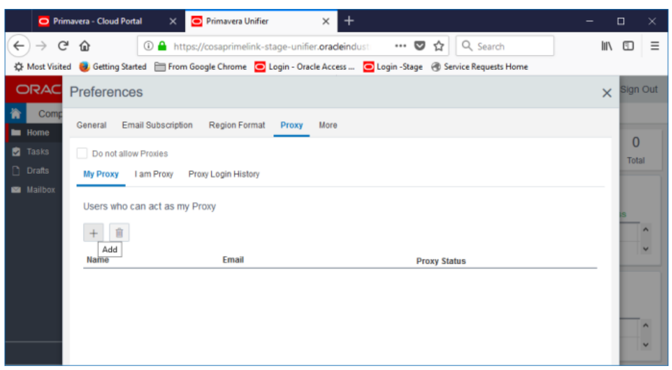
Add a Proxy

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

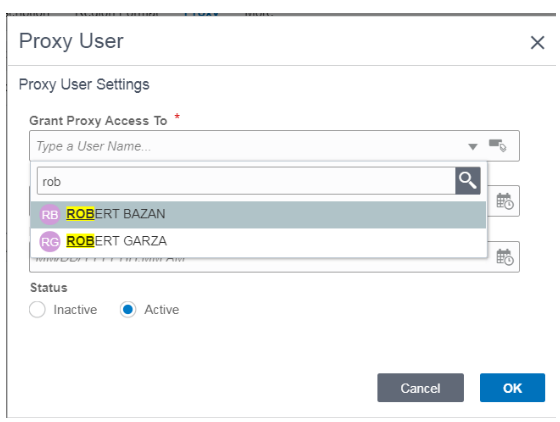
1. Click on your name in the top right corner of the page
2. Click on Preferences

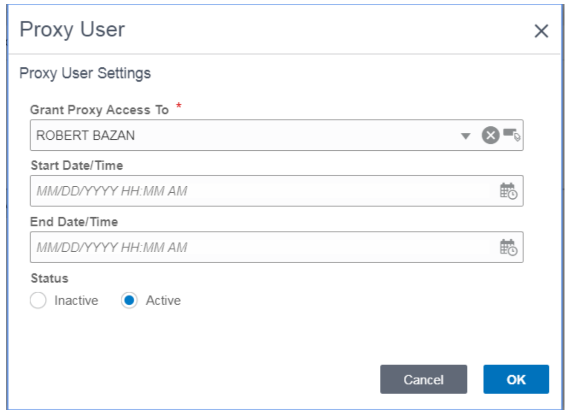


3. Click on Proxy tab
4. Click on + plus sign



5. Click on Select
   - Click on Search, Input the first or last name of the person, click Apply
   - Select the name





6. Enter Start & End Dates (optional)
7. Click Ok

Remove Proxy

1. Click on your name in the top right corner of the page
2. Click on **Preferences**
3. Click on **Proxy** tab
4. Highlight the name you want to remove
5. Click on the **Trashcan** 

Login as a Proxy

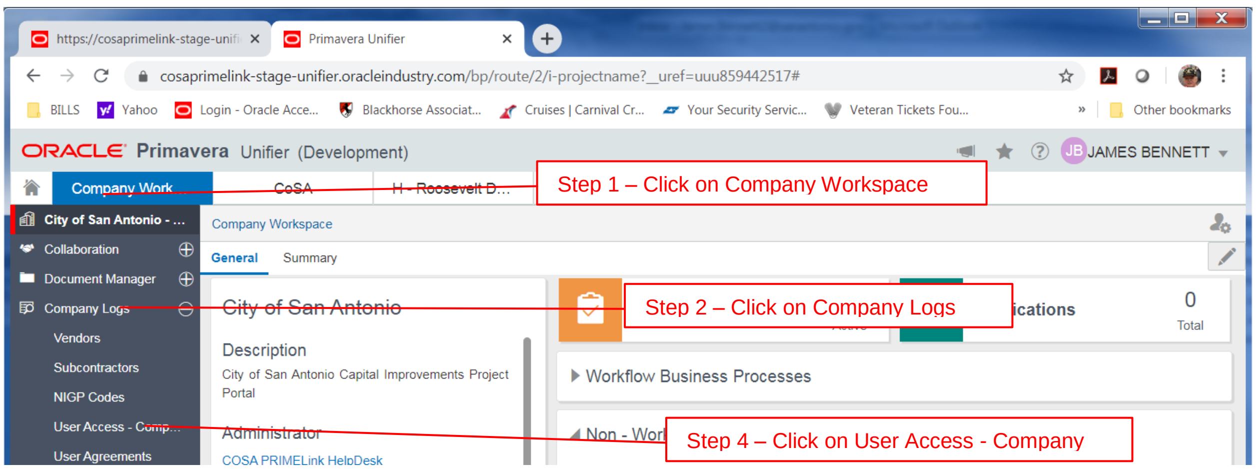
1. Click on your name in the top right corner of the page
2. Click on Preferences
3. Click on Proxy tab
4. Click on “I am Proxy”
5. Highlight the name under – Users I can act as their proxy
6. Click Proxy Logon
7. You will logon on their behalf

User Access Request Form

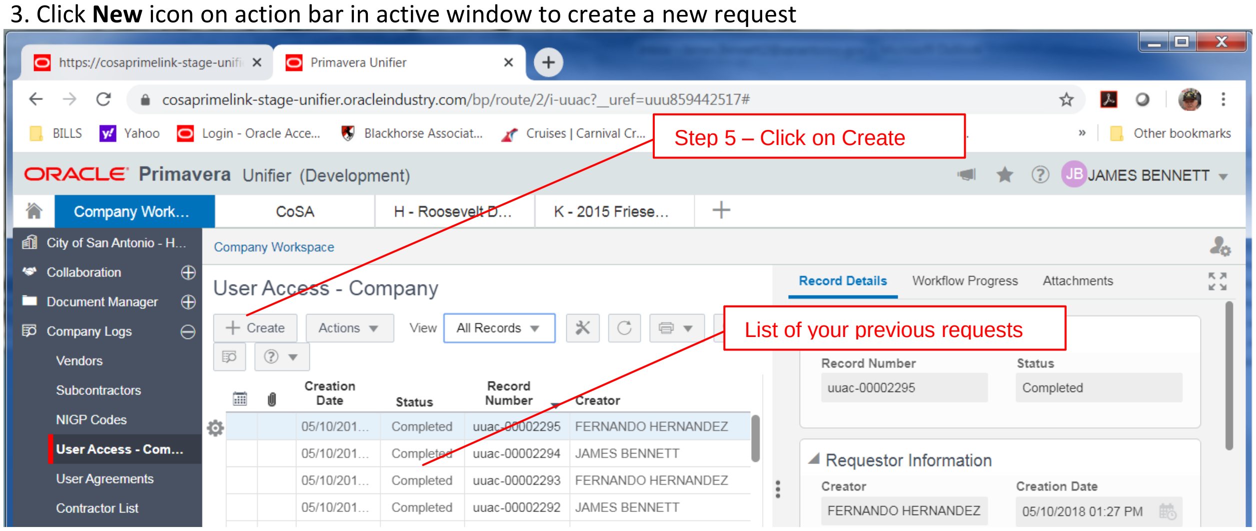
This form will be used by the PRIME*Link* Helpdesk to grant and remove access within the system and track who requested/authorized the user's access.

- Form ***must*** be completed by the requestor/authorizer within PRIME*Link* in order to request, remove or modify a user's access to the system.
- Only personnel who already have PRIME*Link* access will be able to request/authorize access.
- User Access form functions as other PRIME*Link* forms, i.e. form is completed, a Workflow Action is selected and to initiate workflow action the user is required to click on Send action button. **Note:** Users are able to copy from previous requests or individual line items within the form tabs.
- A single request can be used to request accounts for more than one person, assign a person to more than one project, assign multiple people to multiple projects or assign people to both Projects and On-Call Contracts.

1. Logon to PRIMELink
2. Click on **Company Workspace** Tab, click and expand **Company Logs** line and double-click on the **User Access – Company** business process.



3. Click **New** icon on action bar in active window to create a new request



4. On the beginning of the Create New User Access – Company form, denote in the Remarks text field, a brief description of what the access request will entail and/or any other information that will be helpful in understanding the request(s). This information is used by the Helpdesk personnel to determine what needs to be done.

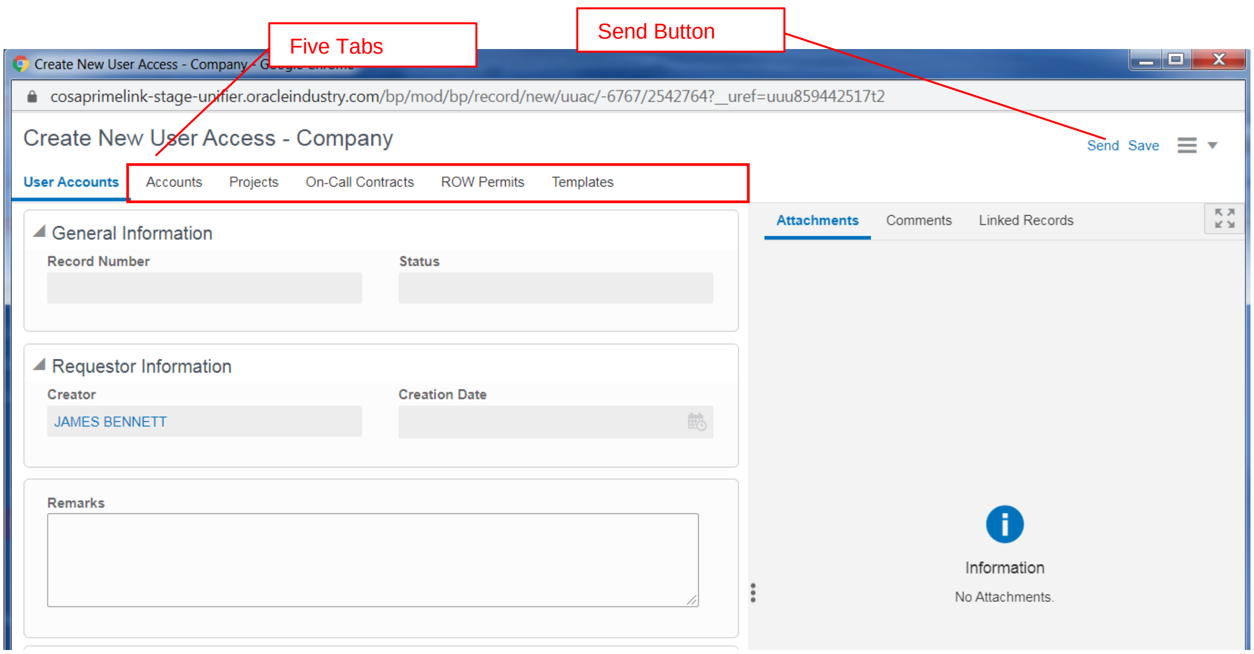
Notes:

- The first page identifies who is requesting/authorizing the user access.
- The fields (Record Number, Status, and creation date) in the Header part of User Access form are auto-populated once the request is submitted.

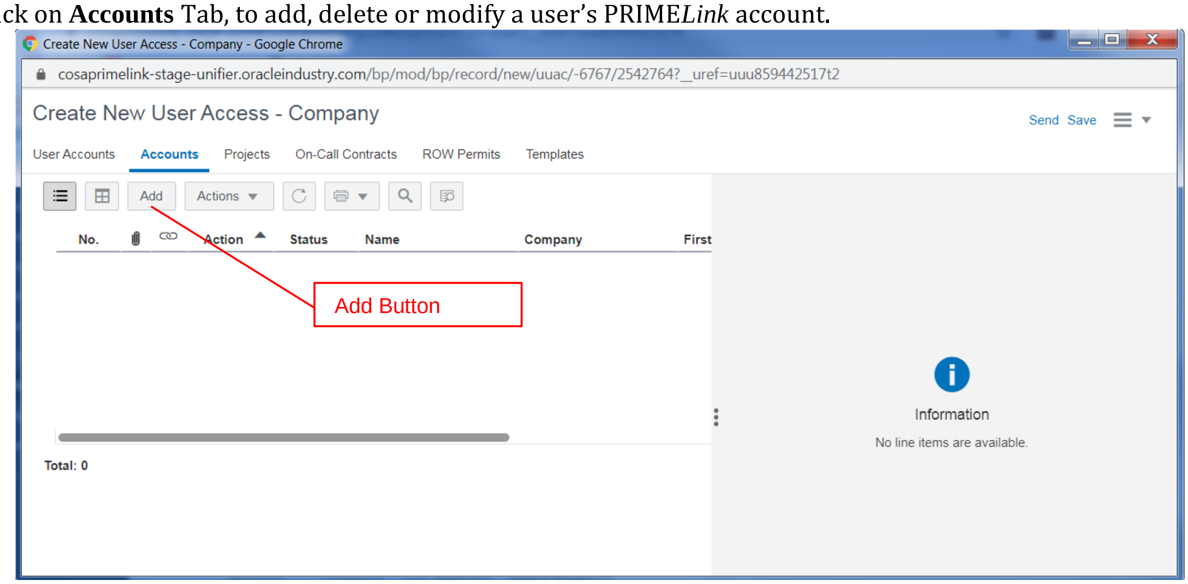
5. Click on the appropriate Tab(s) to open up the detail portion of form for completion, see Steps 5a – 5d.

Notes:

- There are four Detail Forms with tabs entitled
  Accounts, **Projects**, **OnCall Contracts, ROW Permits** and **Templates**.
  User can use more than one tab on a single request.
- The type of access request determines which tab(s) will need to be completed.



5a. Click on **Accounts** Tab, to add, delete or modify a user's PRIME*Link* account.



Click on "**Add**" function button on the top of the Create New User Access – Company form.

To Add User Account

1. Select **Add** from Action drop-down list.

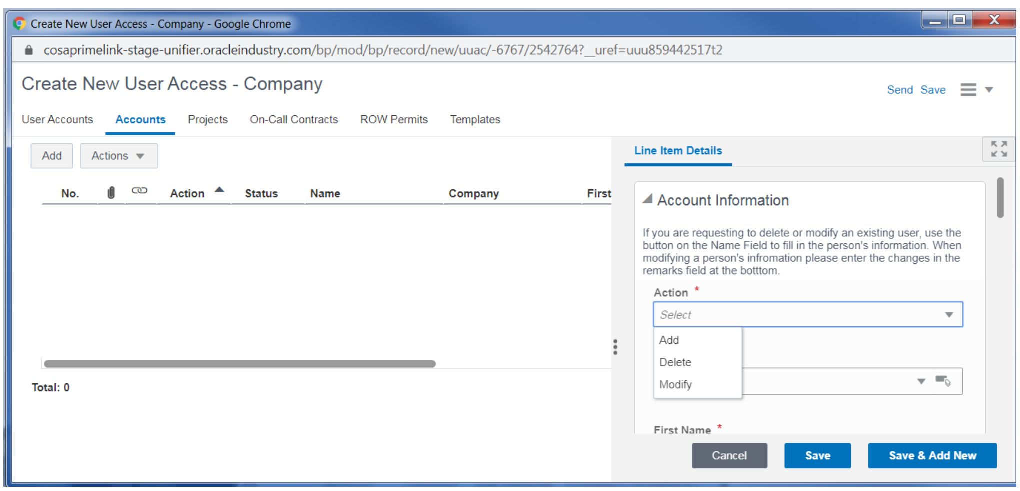
IF THE PERSON ALREADY HAS ACCESS TO PRIMELink, DO NOT USE THIS!
GO TO ONE OF THE OTHER TABS

2. On the left hand side, the Account Information form will appear.
   a. Must complete all of required fields (marked with red asterisk *)
3. Ignore the Name field (i.e. user will be unable to find name in name list since access has not been established yet) and complete the remainder of the fields in the account information tab.
4. For Non-City Employee Account(s) - Please attach the appropriate agreements and answer the questions in the New Non-City Accounts section. If this is the first PRIMELink account for the business, then a Business Agreement is also required. Both agreements are available at

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

Note: An individual user agreement is required for every non-city employee requesting an account.

5. For City Employee Account(s) - Complete the New City Accounts section. **Note:** If your department or division is not on the list, put the information in the remarks field. The user id is the same as your COSA computer logon id.
6. In remark field, enter any other information that will be helpful for the PRIMELink Helpdesk.
7. Click on either **"Save"** or **"Save & Add New"**



To Delete User Account

1. Select **Delete** from Action drop-down list.
2. Use the Name field selection button to find the user you want to delete. Once selected the remainder of the information will be filled out.
3. Denote in Remarks field, if this person was on any workflows or other considerations such as replacing this person with someone else in the workflows.

Note: This action will prevent the user from accessing system for any project. If you want to remove person from a select project or on-call contract use the Projects or On-Call Contract tabs.

To Modify User Account

1. Select **Modify** from Action drop-down list.
2. Use the Name field selection button to find the user you want to modify their profile information. Once selected the remainder of the information will be filled out.
3. Denote in Remarks field, what changes you want the Helpdesk to make on the user's account.

Note: Use this action to change phone numbers, emails or other account information. This will not change what projects or on-call contracts the person has access to.

5b. Click on **Projects** Tab, to add, delete or modify a user's PRIME*Link* account access to a project.

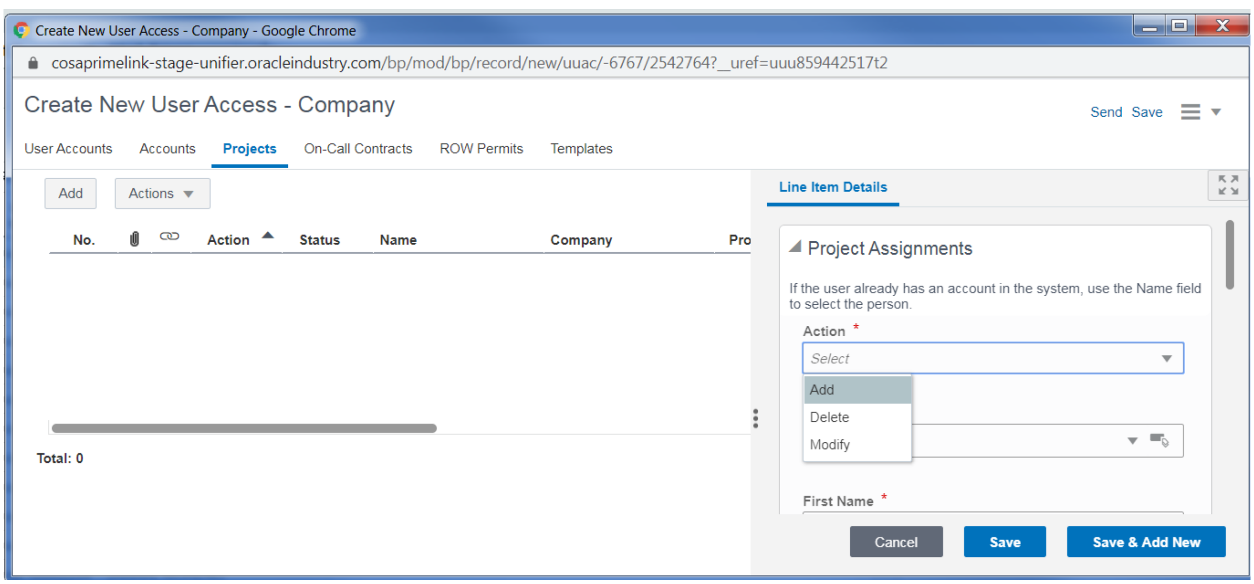
Use the scroll bar on right side of window to view and complete all of requested information.
Click on Add function button on the bottom of the **Project** Tab detail section.

Note: A separate line item is required for each user/project combination. If you need to give a person access to several projects, create the line item for the first project, then copy the line item, open the new line item and change the project along with any change in remarks.

Must complete all of required fields (marked with red asterisk *)

Add, Delete or Modify User Account Access to Project

1. Select appropriate action from Action drop-down list:
    a. Add – if user wants to add user access to a project
    b. Delete – if user wants to remove user access to a project
    c. Modify – if user want to change what a user role on a project
2. Use the Name field selection button to find the user you want to add/delete/modify. Once selected the remainder of the information will be filled out. Note: If the user does not yet have an account you will have to type in the first name, last name and company fields.
3. Choose the Project Role that best fits the user.
4. Use the Project ID selector button to find the project. Note: If you can't find the project, manually enter the project name into the Project Name field.
5. Denote in Remarks field, a brief description of what the person will be doing on the project.
This is used by the Helpdesk personnel to determine exactly which groups within the project the person needs to be in. The groups determine what the user is able to see and do.
6. Click on either **"Save"** or **"Save & Add New"**



5c. Click on **On-Call Contracts** Tab, to add, delete or modify a user's PRIME*Link* account access to an on-call contract.

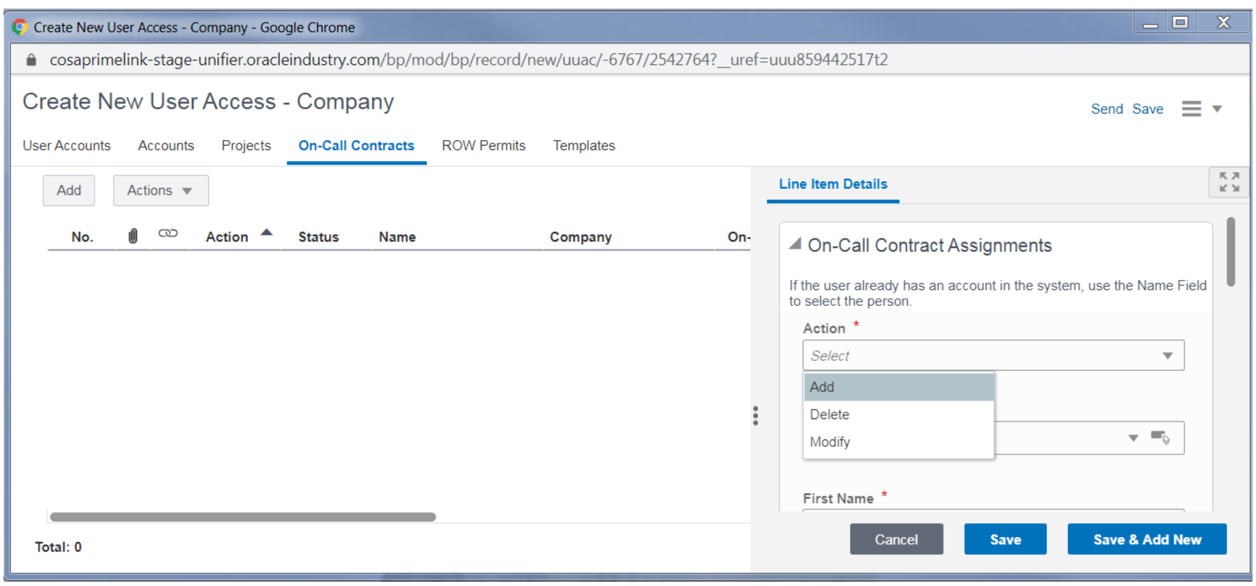
Use the scroll bar on right side of window to view and complete all of requested information.
Click on Add function button on the bottom of the **On-Call Contracts** Tab detail section.

Note: A separate line item is required for each user/on-call Contracts combination. If you need to give a person access to several on-call Contracts, create the line item for the first on-call Contracts, then copy the line item, open the new line item and change the on-call Contracts along with any change in remarks.

Must complete all of required fields (marked with red asterisk *)

Add, Delete or Modify User Account Access to On-Call Contracts

1. Select appropriate action from Action drop-down list:
    a. Add – if user wants to add user access to a on-call Contracts
    b. Delete – if user wants to remove user access to a on-call Contracts
    c. Modify – if user want to change what a user role on a on-call Contracts
2. Use the Name field selection button to find the user you want to add/delete/modify. Once selected the remainder of the information will be filled out. Note: If the user does not yet have an account you will have to type in the first name, last name and company fields.
3. Choose the On-call Contracts Role that best fits the user.
4. Use the On-call Contracts ID selector button to find the on-call Contracts. Note: If you can't find the on-call Contracts, manually enter the on-call Contracts name into the On-call Contracts Name field.
5. Denote in Remarks field, a brief description of what the person will be doing on the on-call Contracts. This is used by the Helpdesk personnel to determine exactly which groups within the on-call Contracts the person needs to be in. The groups determine what the user is able to see and do.
6. Click on either **"Save"** or **"Save & Add New"**



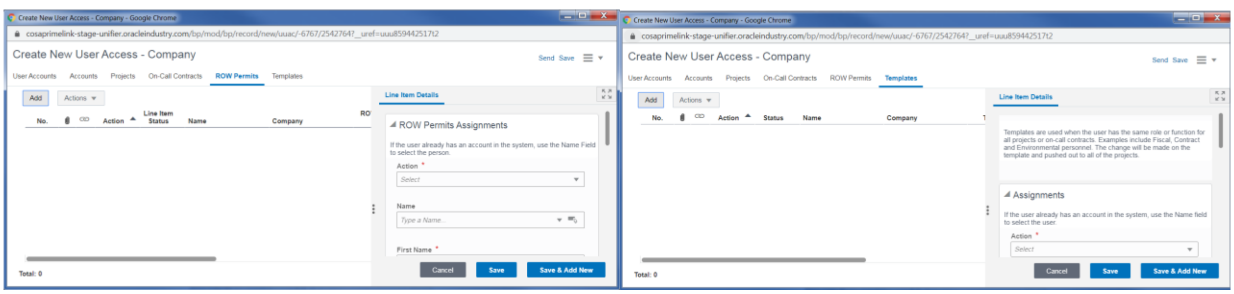
5d. Click on **Templates and ROW Permits** Tabs, to add, delete or modify a user's PRIME*Link* account access on templates.

Use the scroll bar on right side of window to view and complete all of requested information.
Click on Add function button on the bottom of the **Templates** Tab detail section.

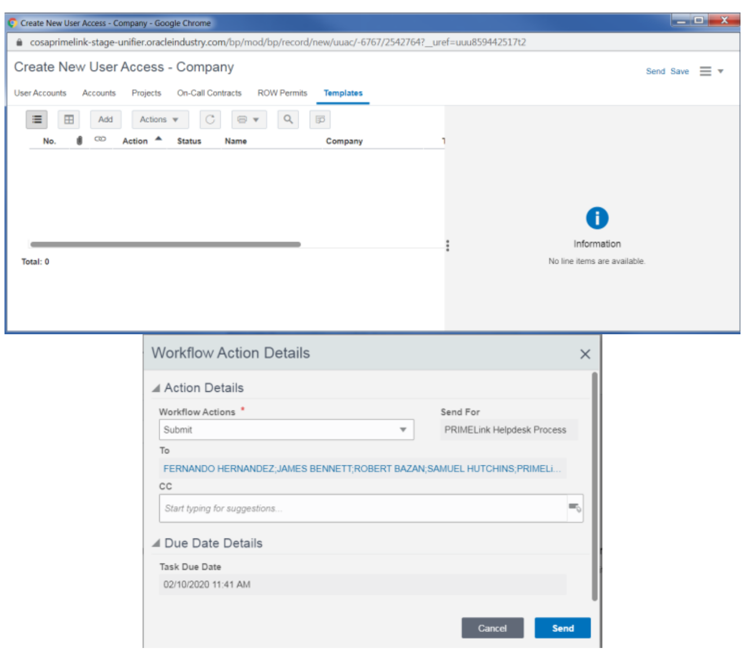
Note: This detail tab is used for only those individuals in
Fiscal, Contract Services, Director's Office, Division Managers, Utility (SAWS/CPS Energy) and TxDOT access groups.

Add, Delete or Modify User Account Access to Templates

1. Select appropriate action from Action drop-down list:
    a. Add – if user wants to add user access across all existing projects
    b. Delete – if user wants to remove user access from all existing project workflows (i.e. project templates)
    c. Modify – if user want to change what a user's role on project template
2. Use the Name field selection button to find the user you want to add/delete/modify. Once selected the remainder of the information will be filled out. Note: If the user does not yet have an account you will have to type in the first name, last name and company fields.
3. Choose the Template Role that best fits the user.
4. Denote in Remarks field, a brief description of what the person will be doing on the On-Call Contracts. This is used by the Helpdesk personnel to determine exactly which groups within the on-call Contracts the person needs to be in. The groups determine what the user is able to see and do.



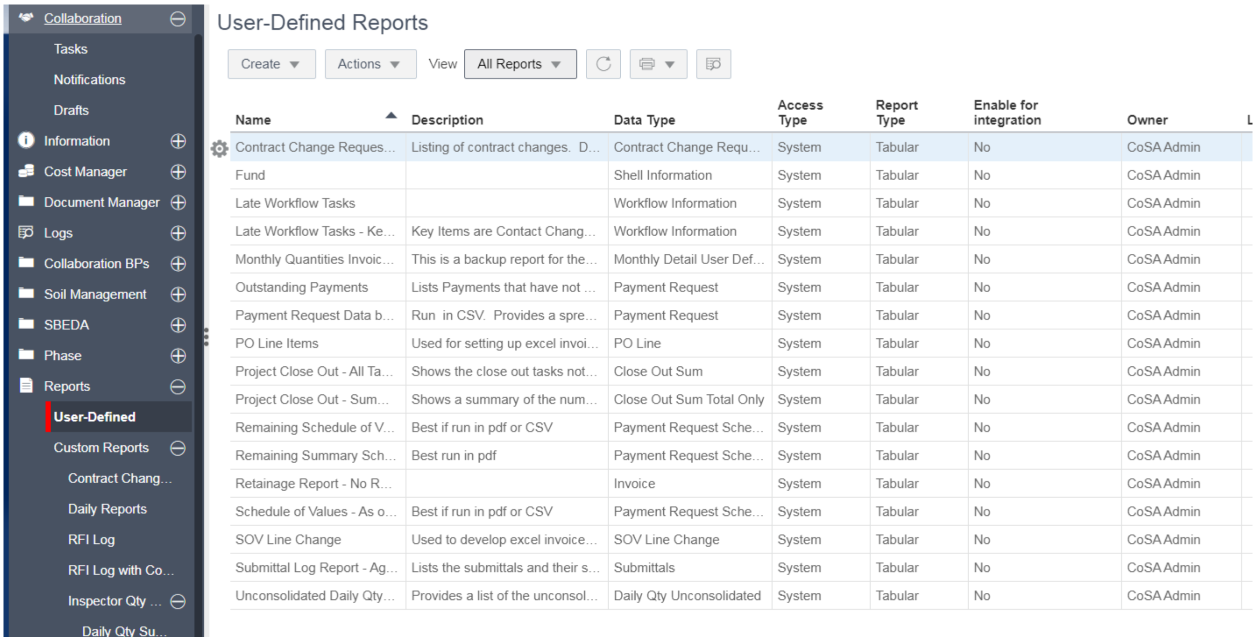
6. Upon completing the appropriate detail tab(s) part of the form. Click in "Send" in the upper right hand corner. Then click on "Send" again on the Actions Details page.



Reports – User-Defined and Custom Reports

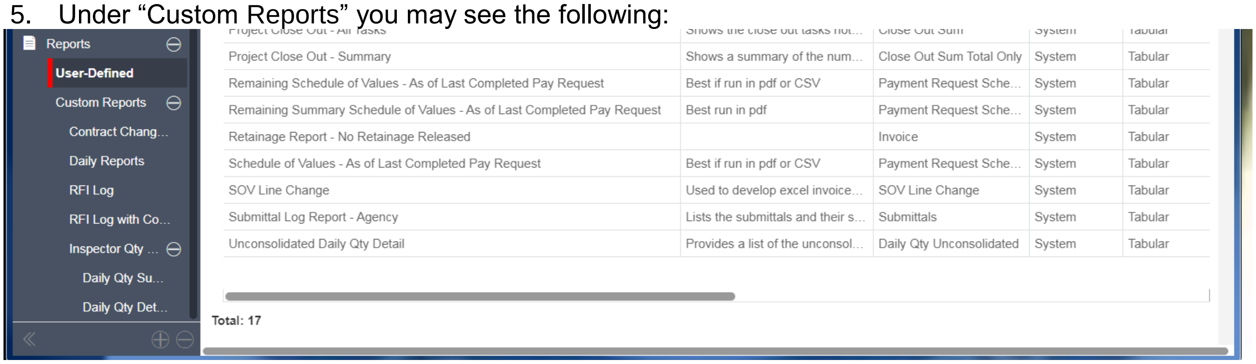
There are many reports in the PRIMELink system that you can use to find out information about your Project or On-Call Contract current items. To find out want reports are available to you do the following:

1. Go to your Project or On-Call Contract
2. Go to the bottom of the menu and click on “Reports”
3. Select “User-Defined” or “Custom Report”
4. Under “User-Defined” you may see the following:

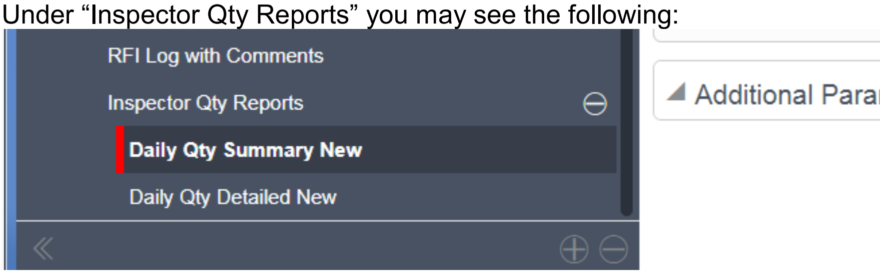


Name	Description	Data Type	Access Type	Report Type	Enable for integration	Owner
Contract Change Reques...	Listing of contract changes. D...	Contract Change Requ...	System	Tabular	No	CoSA Admin
Fund		Shell Information	System	Tabular	No	CoSA Admin
Late Workflow Tasks		Workflow Information	System	Tabular	No	CoSA Admin
Late Workflow Tasks - Ke...	Key Items are Contact Chang...	Workflow Information	System	Tabular	No	CoSA Admin
Monthly Quantities Invoic...	This is a backup report for the...	Monthly Detail User Def...	System	Tabular	No	CoSA Admin
Outstanding Payments	Lists Payments that have not ...	Payment Request	System	Tabular	No	CoSA Admin
Payment Request Data b...	Run in CSV. Provides a spre...	Payment Request	System	Tabular	No	CoSA Admin
PO Line Items	Used for setting up excel invoi...	PO Line	System	Tabular	No	CoSA Admin
Project Close Out - All Ta...	Shows the close out tasks not...	Close Out Sum	System	Tabular	No	CoSA Admin
Project Close Out - Sum...	Shows a summary of the num...	Close Out Sum Total Only	System	Tabular	No	CoSA Admin
Remaining Schedule of V...	Best if run in pdf or CSV	Payment Request Sche...	System	Tabular	No	CoSA Admin
Remaining Summary Sch...	Best run in pdf	Payment Request Sche...	System	Tabular	No	CoSA Admin
Retainage Report - No R...		Invoice	System	Tabular	No	CoSA Admin
Schedule of Values - As o...	Best if run in pdf or CSV	Payment Request Sche...	System	Tabular	No	CoSA Admin
SOV Line Change	Used to develop excel invoice...	SOV Line Change	System	Tabular	No	CoSA Admin
Submittal Log Report - Ag...	Lists the submittals and their s...	Submittals	System	Tabular	No	CoSA Admin
Unconsolidated Daily Qty...	Provides a list of the unconsol...	Daily Qty Unconsolidated	System	Tabular	No	CoSA Admin

5. Under “Custom Reports” you may see the following:

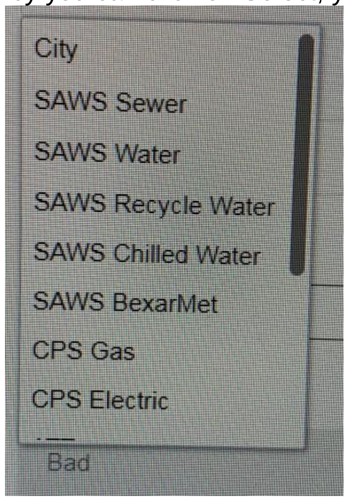


6. Under “Inspector Qty Reports” you may see the following:



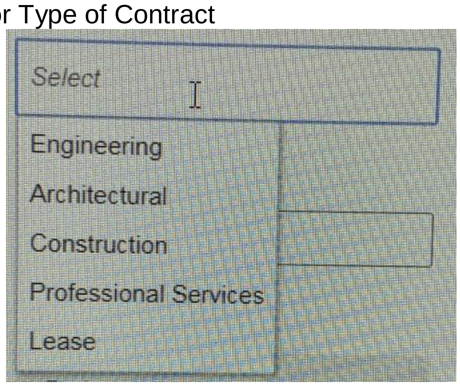
7. Under each report you will find a different kind of request page –

    a. Next to Agency you can click on Select, you will see this



    Click on the one you want or leave it blank

    b. Same for Type of Contract



    Click on the one you want or leave it blank

    c. At the Top - select either CSV or PDF.
        i. CSV will give you a spreadsheet of the items
        ii. PDF will give you a PDF of the items.

8. Go to the bottom and click on Run Report to get the report you are requesting.

If you are using Google Chrome cannot view a PDF file in PrimeLink, it could be because Google Chrome has its own version of a PDF Viewer and it needs to be disabled!

To do that:

1) Right click on Google Chrome icon
2) Click on the Google Chrome name
3) In the top message bar are, type in "*about:plugins*" and hit Enter
4) Click on *Disable* Chrome PDF Viewer