Oracle
**Textura**
**PQM Administrator FAQs**

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# Contents

# About This Guide

This guide addresses questions frequently asked by prequalification Administrators when using the Oracle Pre-Qualification Management (PQM) solution to manage prequalification forms. Typically, General Contractors, Owners, or Developers with administrative permissions on PQM should use this guide.

# Role, User, and Organization Management

## In This Section



## What are permissions?

Permissions relate to the roles you can assign to users.

The system includes the following predefined roles:

- **Administrator**—Creates and edits form templates, generates reports, and accesses most features on the system
- **Approver**—Receives and completes tasks
- **Editor**—Edits categories in form templates
- **Rater**—Uses a five point scale to assign ratings to category data submitted by a Vendor
- **View Only**—Sees information on the system, but cannot perform any actions.

You can also create your own roles with the following permissions:

- Approval Coordinator
- Bonding Requirements Approver
- Bonding Requirements Editor
- Bonding Requirements Rater
- Bonding Requirements Viewer
- CDI Insured Administrator
- CDI Insured PM
- CDI Project and Contract Administrator
- CDI View Project Sold Rate
- Create Default Remedy
- Financial Administrator
- Financial Information Requirements Approver
- Financial Information Requirements Editor
- Financial Information Requirements Overrider
- Financial Information Requirements Rater
- Financial Information Requirements Viewer
- Financial Score Editor
- General Information Requirements Approver

- General Information Requirements Editor
- General Information Requirements Rater
- General Information Requirements Viewer
- Inbound Compliance Requirement Viewer
- Insurance Requirements Approver
- Insurance Requirements Editor
- Insurance Requirements Rater
- Insurance Requirements Viewer
- Legal Information Requirements Approver
- Legal Information Requirements Editor
- Legal Information Requirements Rater
- Legal Information Requirements Viewer
- Litigation Requirements Approver
- Litigation Requirements Editor
- Litigation Requirements Rater
- Litigation Requirements Viewer
- Local Administrator
- Notary
- Organization Administrator
- Organization Inviter
- PDF Viewer
- PQM Package Administrator
- PQM Package Viewer
- PQM Request Administrator
- PQM Request Viewer
- Prequalification Vendor Approval
- Printable Compliance Requirement Approver
- Project History Requirements Approver
- Project History Requirements Editor
- Project History Requirements Rater
- Project History Requirements Viewer
- Reference Requirements Approver
- Reference Requirements Editor
- Reference Requirements Rater
- Reference Requirements Viewer
- Role Administrator
- Safety Requirements Approver
- Safety Requirements Editor
- Safety Requirements Rater
- Safety Requirements Viewer
- Total Quality Management Requirements Approver
- Total Quality Management Requirements Editor

- Total Quality Management Requirements Rater
- Total Quality Management Requirements Viewer
- Upload Aonchor Data
- Vendor Administrator
- View Financial Information
- View Only
- View Organization Information
- View Prequalification Requirement Ratings
- View Roles
- View Vendor Information

## How do I create a role?

Roles determine which permissions are available to a user or group on the system.

1) From the **Management** menu of the Navigation Bar, select **Role Management**.
   The **Role Management** page displays.
2) Select + **Create Role.**
   A **Create Role** dialog box appears.
3) Enter a name for the role.
4) (Optional) In the header field of the **Available Permissions** box, begin entering text to filter the list of permissions.
5) In the **Available Permissions** box, choose permissions to assign to the role.
6) Select the **>** (right arrow icon) to move selected permissions to the **Assigned Permissions** box.
7) (Optional) Choose permissions from the **Assigned Permissions** box and select the **<** (left arrow icon) to return the selected permissions to the **Available Permissions** box.
8) When the **Assigned Permissions** box lists all required permissions, select **Create**.
   A **Role Created** message appears at the bottom of the page.

## How do I create a group?

Create a group for users with shared responsibilities.

1) From the **Management** menu of the Navigation Bar, select **Role Management**.
   The **Role Management** page displays.
2) From the **Role Management** page, select the **Groups** tab.
3) Select **+ Create Group**.
   A **Create Group** dialog box appears.
4) Enter a group name.
5) (Optional) Enter a group description.
6) (Optional) In the header field of the **Available Users** box, begin entering text to filter the list of users.
7) In the **Available Users** box, choose users to assign to the group.
8) Select the **>** (right arrow icon) to move selected users to the **Members** box.

9) (Optional) Choose users from the **Members** box, and select the **<** (left arrow icon) to return selected users to the **Available Users** box.
10) When the **Members** box lists all required users, select **Create**.
A **Group Created** message appears at the bottom of the page.

## How do I assign a role?

Assign a role to grant permissions to a user on the system.

1) From the **Management** menu of the Navigation Bar, select **Role Management**.
The **Role Management** page displays.
2) From the **Role Management** page, choose the **Assignments** tab.
The left-hand side of the table lists all users and groups in your organization. The right-hand side of the table shows a column for each existing user role.
3) Select **Edit**.
4) In the row for a user or group, select the check box for the required role.
5) Select **Save**.
A **Changes Saved** message appears in the center of the page.

## How do I invite a user?

Members from your organization need to receive an invitation before they can access the system.

1) From the **Management** menu of the Navigation Bar, select **User Management**.
The **User Management** page displays.
2) From the top of the **User Management** page, select **+ Invite User**.
An **Invite User** dialog box appears.
3) Enter the email address of the user.
4) (Optional) Choose roles for the user.
5) (Optional) Choose groups for the user.
6) Select **Invite**.
An **Invitation Sent** message appears at the bottom of the page.

## What are my search options when looking for a contact in my address book?

You can search for contacts by:

- Organization
- Vendor ID
- Custom ID
- Trade
- City
- State
- Country
- Tag

- Email
- Phone Number.

# Vendor and Workflow Management

## In This Section



## How do I update Vendor information?

1) From the **Address Book** menu of the **Navigation Bar**, select **Browse**.
   The **Browse** page displays. Vendors display in alphabetical order.
2) (Optional) Enter company information in the search fields to filter Vendors:
   - **Organization**
   - **Vendor ID**
   - **Custom ID**
   - **Trade**
   - **City**
   - **State**
   - **Country**
   - **Tag**.
3) Select the pencil icon in a Vendor row to navigate to the **Vendor Dashboard**.
4) Select the **Vendor Info** tab.
5) (Optional) Enter financial information:
   - **Outstanding Contracts**
   - **Outstanding Cntrc (Contract) Balance**
   - **Backlog Limit**
   - **Average Performance Rating**
   - **Safety Net**
   - **Date Valid Until**
   - **Qualified Bidder**
   - **Custom ID**
   - **Rating.**

6) Select **Save**.
   A **Success! Vendor Dashboard Saved** message appears at the top of the page.

## How do I add a Vendor note?

1) From the **Address Book** menu of the Navigation Bar, select **Browse**.
   The **Browse** page displays. Vendors display in alphabetical order.
2) (Optional) Enter company information in the search fields to filter Vendors:
   - **Organization**
   - **Vendor ID**
   - **Custom ID**
   - **Trade**
   - **City**
   - **State**
   - **Country**
   - **Tag**.
3) Select the pencil icon in a Vendor row to navigate to the **Vendor Dashboard**.
4) Select the **Notes** tab.
5) From the **Vendor Notes** section, select **+ Add Note**.
   A text box opens.
6) Enter a note.
   This note will link directly to the Vendor.

   **Notes:**

   - *Vendor notes cannot exceed 2000 characters.*
   - *You can bold, italicize, underline, and change the color of entered text. Text can also be formatted into a bulleted or ordered list.*

7) Select **Add.**
   The note displays in a table. The row includes:
   - **User**
   - **Date**
   - **Note**.
8) (Optional) Edit the note.
   1. From the last column, select the pencil and paper icon.
      A text box opens.
   2. Edit the note and select **Save**.
9) (Optional) Delete the note.
   1. From the last column, select the red **X**.
      A **Delete Note** dialog box appears.
   2. Select **Yes**.
      The system removes the note.

10) Select **Save**.
A **Success! Vendor Dashboard Saved** message appears at the top of the page.

## How do I add Vendor tags?

1) From the **Address Book** menu of the Navigation Bar, select **Browse**.
The **Browse** page displays.
2) (Optional) Enter company information in the search fields to filter Vendors.
3) Select the pencil icon in a Vendor row to navigate to the **Vendor Dashboard**.
4) Select the **Vendor Info** tab.
5) In the **Tags** field, enter a word or phrase.

> **Note:** *Tags must be between three and 100 characters*

6) On your keyboard, press **Enter**.
The tag appears in blue.
7) (Optional) Follow **Step 4** and **Step 5** to add additional tags.
8) From the bottom of the page, select **Save**.
A **Success! Vendor Dashboard Saved** appears at the top of the page.

## How do I create another Vendor Approval Workflow for an existing profile?

1) From the **Management** menu of the Navigation Bar, select **Workflow Management**.
The **Workflow Management** page displays.
2) Under the **Vendor Approval Workflow Profiles** section, select the name of the profile to edit.
3) Select **+ Create Workflow**.
A **Create Vendor Approval Workflow** dialog box appears.
4) Enter a name for the workflow.
5) (Optional) Choose to send a notification when the Vendor approval is given an **Approved** status.
6) Choose a workflow type:
   - **Parallel**—Multiple Approvers approve the Vendor workflow in any order
   - **Serial**—Multiple Approvers approve the Vendor workflow in a specific order
7) Enter the number of Approvers.
8) (Optional) Choose to include all users in the workflow.
9) Assign a group to the workflow.

> **Note:** *This step is unavailable if you chose to include all users in the workflow.*

1. From the **Available Groups** box, select a group.
   The selected group highlights in yellow.
2. Select the **>** (right arrow icon) to move the selected group to the **Assigned Groups** box.

10) (Optional) Assign additional groups to the workflow.
11) Select **Create**.
    A **New final review workflow created** message appears at the bottom of the **Workflow Management** page, and the workflow appears in the table.
12) (Optional) To activate the new workflow, select the red circle in the **Status** column.

> **Note:** *If the Vendor Approval Workflow Profile does not allow the Vendor Approval Initiation step, activating the new workflow will deactivate any existing workflows for future tasks. Existing tasks will still follow the previous workflow.*

## How do I set up a Category Review Workflow Profile?

1) From the **Management** menu of the Navigation Bar, select **Workflow Management**.
   The **Workflow Management** screen displays.
2) Under the **Category Review Workflow Profiles** section, select **+ Create Profile**.
   A **Create Category Review Workflow Profile** dialog box appears.
3) In the dialog box, enter a name for the profile.
4) (Optional) From the drop-down, choose to automatically begin an existing Vendor Approval Workflow after completing category reviews.
5) Select **Create**.
   The dialog box closes and the name of the profile appears in the **Category Review Workflow Profiles** section.
6) To add a workflow to the new profile, select its name.
   The page changes, and an empty table displays for the profile.
7) Select **+ Create Workflow**.
   A **Create Category Review Workflow** dialog box appears.
8) In the dialog box, enter a category name and select an effective date.

> **Note:** *Effective dates must be in the future. You cannot select a date from the past.*

9) (Optional) Choose a workflow type:
   - **Parallel**—Multiple Approvers approve the Vendor workflow in any order
   - **Serial**—Multiple Approvers approve the Vendor workflow in a specific order
10) Enter the number of Approvers.
11) (Optional) Choose to include all users in the workflow.
12) Assign a group to the workflow.

> **Note:** *This step is unavailable if you choose to include all users in the workflow.*

   1. From the **Available Groups** box, select a group.
      The selected group highlights in yellow.
   2. Select the **>** (right arrow icon) to move the selected group to the **Assigned Groups** box.

13) (Optional) Repeat **Step 12** to assign an additional group to the workflow.

14) Select **Create**.
A **New approval workflow created** message appears at the bottom of the page.

## How do I restart a Vendor Approval Workflow?

Only users with the **Approval Coordinator** permission can restart Vendor workflows.

1) From the **Approvals Landing Page**, select the **Row Menu** in the row for the workflow to restart.

> **Note:** *Hover over the first column to show the* **Row Menu**.

2) Select **Restart Approval**.
A **Restart Approval** dialog box appears.

3) From the dialog box, select **Yes**.
The **Vendor Dashboard** for the Vendor displays. An Approver can now choose a new status.

## Can I override Submitter form information?

Reviewers can override some information a Submitter included in the **Financial Information**, **Banking**, **Bonding**, and **Safety Information** sections. When a Reviewer overrides information, the PQM application records the name of the individual who made the change, and the date and time the edit occurred.

Yellow highlighting on the form signifies a Reviewer edited information. Hover your cursor over the highlighted area to see more information about the change.

To override information:

1) Select the **Edit** button when reviewing a category that allows overrides.

2) (Optional) Select the **Restore** button to revert the changes to the original data entered by the Submitter.

> **Notes:**
>
> - You cannot override information in the **Fatalities** and **Safety Professionals** tables in the **Safety Information** category.
> - You cannot override yes/no questions or check boxes in the **Banking** and **Bonding** categories.
> - You cannot override information once you complete the review of a form.
> - Use the PDF link on the **Form Administration** page to access the full PDF with overridden information. If you choose to view the PDF for an individual category, the PDF will include overridden data only for the selected category. PDFs of the whole form generated elsewhere will not show overrides.
> - The full PDF generated from the **Form Administration** page only

shows overridden information for the **Safety Information** section. You cannot see this information for overrides in the **Financial Information** section.

- This feature must be added by a PQM representative. Contact your representative if you are interested in accessing this override functionality.

## Is there an easy way to compare original and overridden values?

You can easily compare original values and overridden values when completing the vendor approval process.

Hover your cursor over an overridden value. A tooltip displays. The tooltip includes the original submitted value, the overridden value, the name of the person who overrode the original value, and the time the override occurred.

## How do I view overridden safety values?

To view safety values your organization Safety Information Overrider changed:

1) Navigate to the **Approval** tab.
2) From the **Approval** tab, select the **Safety Information** form.
3) After opening the form, open the **Form** tab.
4) Expand the category.

   The overridden values display on the page.

# Form Templates

## In This Section



## How do I create a Form Template?

1) From the **Prequalification** menu of the Navigation Bar, select **Form Templates**.
   The **Form Templates** page displays.
2) Select the **+** (green plus sign).
   An **Add/Edit Form Template** dialog box appears.
3) Enter a name for the Form Template.

   **Notes:**

   - *This is a required field.*
   - *This name displays in the Submitter workspace as the title for a prequalification form.*

4) (Optional) Select **Require Vendor approval on submissions** if an Approver should review and select a prequalification status.
5) (Optional) To require a signature on the form, select **Print and Sign Final Request**.
   Additional optional fields appear.
   - Upload an image to use as a logo on forms.
   - Add a title.
   - Enter text to display in the header of the form.
   - Enter text to display in the footer of the form.
6) Select **Save**.
   A **Form Template was saved successfully** message appears at the bottom of the page.

## How do I add categories to a form?

1) Select the **+** (green plus sign) next to **Categories**.
2) From the first drop-down, select a group for the category.
3) From the second drop-down, select a category.
4) Enter a title.
5) (Optional) Include instructions for the category.

6) Select whether the category requires an attachment or a signature attachment.
7) Select whether an **N/A** submission is allowed.
8) (Optional) Select **Save** to add the category to the form. The dialog box remains open so you can add additional categories.
9) Select **Save and Close**.
   The dialog box closes and all groups become a tab in a table. Categories display in the table under the group in which they belong.

## Can I choose which questions to include in a form?

At first, all forms on the system include all available questions in an included category.

1) In the table for the category to be edited, select **Form**.
   The **Form** section expands. It includes a table of fields and their default definitions.
2) Select the **Field Menu** next to the field to be hidden.
   A drop-down menu opens.
3) From the drop-down, select **Hide.**
4) Select **Save**.
   - A **Category saved successfully** message appears at the bottom of the page.
   - The hidden question will not appear on the Submitter form.

If a hidden question should appear in a form, use the same method to unhide it.

1) In the table for the category to be edited, select **Form**.
   The **Form** section expands.
2) Select the **Field Menu** next to a hidden field name.
   A drop-down menu opens.
3) From the drop-down, select **Show**.
4) Select **Save**.
   - A **Category saved successfully** message appears at the bottom of the page.
   - The question will now appear on the Submitter form.

## How do I require a question for submission?

A Submitter cannot submit a category before answering all required questions. Use the **Form Templates** page to determine which questions a Submitter must answer.

1) In the table for the category to be edited, select **Form**.
   The **Form** section expands.
2) Select the **Form Menu** next to the field to be edited.
   A drop-down menu opens.
3) From the drop-down, select **Require Field**.
4) Select **Save**.
   - A **Category saved successfully** message appears at the bottom of the page.
   - A red asterisk appears next to the question in a Submitter workspace, signifying it is a required field.

## How do I update a template after sending the form to a Submitter?

An Oracle PQM representative can help update the form.

Call +1 (866) 839-8872, and choose **Option 2** for assistance. Then, choose **Option 1** to receive help as a General Contractor organization.

# Form Administration

## In This Section



## What is the Form Administration page?

The **Form Administration** page is the central location for form request management. View a Vendor prequalification status summary table, add or invite a Vendor to prequalify, create forms, and update settings.

**Notes:**

- *You must have the* **Request Viewer** *or* **Request Administrator** *permission to perform actions on the* **Form Administration** *page.*
- *If your organization needs different groupings on-system, consider creating more than one form. However, an invited Vendor will need to qualify with each form individually.*

The Vendor prequalification status table includes details about every Vendor prequalifying with your organization. Each organization appears as a row in the table. A Vendor name may display in multiple rows if the organization is prequalifying with more than one form.

Columns include:

- **Row Menu**—Opens a drop-down menu for the row; selecting a Vendor also opens a panel at the bottom of the screen
  - **View Form**—Open the Reviewer workspace to view a form
  - **View as PDF**—Open or save the form as a PDF file
  - **Re-invite**—Re-send an email invitation to a company
  - **Remind Reviewer**—Send an email reminder to all Reviewer users working on a form (only if there are outstanding Reviewer tasks)
  - **Remind Vendor**—Send an email reminder to all Vendor users on a form (only if there are outstanding Vendor submission tasks)
  - **Modify Tags**—Add or remove a Vendor tag

- **Remove** —Remove a Vendor from a prequalification

> **Note:** *Removed Vendors still display in the table. The* **Vendor** *column will include a prohibition sign and a* **(REM)** *tag.*

- **Vendor**—Lists the Vendor name, location, and primary contact name; a red flag displays next to a flagged Vendor
  - (PDF icon)—View the form as a PDF
  - (Form icon)—Open the Reviewer workspace to view a form
- **Form**—Displays the name of a form

> **Note:** *The* **Form** *column for* Inactive *forms includes an* **(INA)** *tag.*

- Form Status
  - **Request**—Either the date the Vendor was invited, or the date the submission was created

> **Note:** *There are three different request statuses:*
>
> - **No Response**—*The Vendor has not responded to a request and at least 30 days have passed since the invitation*
> - **Registering**—*The Vendor has not responded to a request and less than 30 days have passed since the invitation*
> - **Sending**—*The system is inviting the Vendor to prequalify; reloading the page removes this status*

  - **Submit**—Either the date a Vendor submitted a completed form, or the number of categories submitted out of a given total
  - **Review**—Either the date a Reviewer completed a form review, or the number of categories reviewed out of a given total
  - **Complete**—Version number of the completed form; this number corresponds with how many times the Vendor was invited to prequalify with this form
- **Expires**—Displays the earliest expiration date of a form category
- **Qual Status**—Displays the baseline level status of an approval
  - **In Progress**—A form approval has not been initiated, or a status has not been selected
  - **-** —The submission does not have a baseline Vendor approval
  - [**Status**]—A custom form status selected for the form from the **Vendor Dashboard** (Approved, Conditionally Approved, Rejected, etc.)

> **Note**: *Select a pre-qualification status to navigate to the approval.*

- **Workflow—**Displays the workflow selected for the form
- **Activities**—Lists activities associated with a Vendor
- **Tags**—Lists vendor tags for the Vendor prequalifying with the form; select the pencil icon to add or edit tags.

## What information can I see on the Form Administration page?

Each **Vendor Table** row includes information on both a specific form submission and the associated Vendor. Rows related to unregistered Vendors display the Vendor's registration status. Rows for registered Vendors display the most recent form submission status.

Select a row to open a panel at the bottom of the page.

From the top of the panel, select a tab to view additional information:

- **Notes—**Lists notes posted to a form submission
    - Category
    - User
    - Date
    - Note
    - Organization
    - Public
- **Category Workflows**—Lists the current workflow for each category in a form submission
    - Category
    - Status
    - Reviewers
    - Reviewed By
    - Reviewed On
    - Note.

## What do the colored circles mean?

**Red**—A Vendor has not registered and 30 days passed since the invitation (Request column only)

**Yellow**—The current step in the workflow

**Orange**/**Orange and Yellow**—A visual representation of progress made toward completing a step in the workflow; yellow represents work to be done, while orange represents work completed

**Light Gray**—No data is available because the workflow step is not applicable at this time

**Dark Gray**—A Vendor was removed or a form was deactivated

**Green**—The workflow step is complete

## Can I filter the form table?

Filtering limits the number of entries displayed in the form table.

**Note:** *Use more than one filter to further narrow the list of entries. If no entries satisfy all configured filters, an error displays. Select* **Clear** *to return the table to its original state.*

### Filter by Vendor

1) In the **filter by vendor, activity or tag** field, enter text.
   A drop-down list with matching results displays.
2) From the drop-down list, select the appropriate item.
   Only forms which satisfy the selected criteria display in the table..

### Filter by Form

1) In the **filter by form** field, select the down arrow.
   A drop-down list of all forms displays.

   **Notes:**

   - *The drop-down list organizes each form alphabetically. Active forms display under an* **All Active Forms** *header, and inactive forms display under an* **All Inactive Forms** *header.*
   - *When the drop-down list displays, enter text to manually search for a form. The drop-down list filters to show only results which match the entered text.*

2) Select a form.
   Only the selected form displays in the table.

### Filter by Status

1) In the **filter by status** field, select the down arrow.
   A drop-down list of all form statuses displays.

   **Note:** *When the drop-down list displays, enter text to manually search for a status type. The drop-down list filters to show only results which match the entered text.*

2) (Optional) Select a **Submission Status:**
   - **Pending Registration—**A Vendor has been invited to use the system, but has not yet accepted the invitation to prequalify.
   - **Pending Submission**—A Vendor still has categories to submit
   - **Pending Review**—A Reviewer still has sections to review
   - **Complete**—A form has been fully submitted and reviewed
   - **Expiring Soon**—A category will expire within 30 days
   - **Removede**—Either a Vendor was removed from a form, or a form was deactivated

   Only forms with the selected status display in the table.
3) (Optional) Select a **Qualification Status**:
   - **In Progress**—A form approval has not been initiated, or a status has not been selected

- [**Status**]—A custom form status selected for the form from the **Vendor Dashboard** (Approved, Conditionally Approved, Rejected, etc.)

Only forms with the selected status display in the table.

### Clear Search

Select the **X** next to a search field to clear search criteria.

## How do I update form settings?

You must have the **Request Administrator** permission to update form settings.

1) From the **Prequalification** menu of the Navigation Bar, select **Form Administration**.
   The **Form Administration** page displays.
2) Select the **Form Settings** drop-down.
   A list of all available forms displays.
3) Choose a form to edit.
   A **Form Settings** dialog box appears.

### (Optional) Update General Settings

1) Select the **General** tab.

> **Note:** *The* **General** *tab displays by default.*

2) Update or change the request name.
3) Choose when Reviewers receive system emails:
   - After each section is submitted
   - After all sections are submitted.
4) From the **Contacts** drop-down list, select a contact to display to submitting users.
5) Select workflow options. Either:
   - Always use the same workflows for this form

> **Note:** *This option requires a* **Category Review Workflow**.

   - Allow a choice of workflows per vendor.
6) Select **Save**.

> **Note:** *Save changes before navigating to another section or closing the dialog box.*

### (Optional) Update Expiration Rules

1) Select the **Expiration Rules** tab.
   Expiration settings display.
   - To update settings for all categories, select options from the drop-down lists at the top of the page.

- To update settings for a single category, select options from the drop-down lists in the section row.

2) Choose whether sections expire automatically or manually.
   For sections which expire automatically:
   1. Select how often a section requests new data.
   2. Choose how to configure expiration dates:
      Vendor's fiscal year end date
      Section's review date
      The date of [custom date].
3) Select **Apply**.

## How do I add a Vendor to a form?

You must have the **Organization Inviter** or **Request Administrator** permission to add a Vendor.

1) From the **Prequalification** menu of the Navigation Bar, select **Form Administration.**
   The **Form Administration** page displays.
2) Select the **+ Add Vendor** drop-down.
   A list of available forms displays.
3) From the drop-down list, select a form.
   An **Add Company to** [**Request Name**] dialog box opens.

### Existing Vendor

1) From the dialog box, select the **Existing Vendor** tab.

> **Note:** *The Existing Vendor tab opens by default.*

2) In the row for the Vendor to be included in the form, either:
   - Select the **+ Add Company** button to add the Vendor to the form request
     The button disappears, replaced by a **Pending Submission** status.
   - Select the **Invite Company** button to invite the Vendor to prequalify.
     The button disappears, replaced by a **Pending Registration s**tatus.
3) From the upper right-hand corner of the dialog box, select the **X**.
   The dialog box closes.

### New Vendor

1) From the dialog box, select the **New Vendor** tab.
2) Complete all required fields:
   - Company Name
   - First Name
   - Last Name
   - Phone, Phone Type
   - Email

- Address
- City
- State/Province
- Postal Code

3) Select the **Invite** button.

## How do I create a form?

You must have the **Request Administrator** permission to create a form.

1) From the **Prequalification** menu of the Navigation Bar, select **Form Administration**.
   The **Form Administration** page displays.
2) From the **Actions** drop-down, select **Create Form.**
   A **Create Form** dialog box appears.
3) In the dialog box, select a template from the **Template** drop-down.
4) Enter a name for the form.
5) Select **Create**.
   The dialog box closes. The form name will display in both the **+ Add Vendor** and **Form Settings** drop-down lists.

> **Note:** *All newly created forms will have default settings. To update settings, select the form from the* **Form Settings** *drop-down list.*

## How do I view form history?

1) From the **Vendor** column, select the ⊕ expand icon.
   The icon turns red and all previous versions of the form appear under the most current version.
2) To view a specific form, select the PDF icon from the **Vendor** column of the form version.
   An **Opening Submission** dialog box appears.
3) From the dialog box, select the **Open with** option.

> **Note:** *To save the form, select* **Save File** *instead.*

4) Choose a program to use to open the file, and select **OK**.

## How do I send email reminders?

Use the **Form Administration** page to send email reminders to a single organization at different stages of the prequalification process.

### From the Gear Icon

When an Administrator can send an email reminder for a form, new options appear under the gear menu.

**See** *What is the Form Administration Page for an overview of this menu.*

### From the Form Table

1) In the table, find the row for the form and users to remind.
2) (Optional) Re-vinvite Company—From the **Request** column, select the blue mail icon.
   - The system sends an email to the invited Vendor, reminding the organization to join the prequalification.
   - A **Re-invite was successful** message appears.
   - The time displayed in the circle resets to **<1hr**.
3) (Optional) Remind Vendor—From the **Submit** column, select the blue mail icon.
   A **Confirm** dialog box displays. It includes the company name and each user who will receive an email.
   1. From the dialog box, select **OK**.
   2. The system sends an email to all users previously listed in the dialog box, reminding them to submit remaining categories.

   **Note:** *The email sent to the Vendor lists the names of all remaining categories.*

4) (Optional) Remind Reviewer—From the **Review** column, select the blue mail icon.
   A **Confirm** dialog box displays. It lists your company name and each user who will receive an email.
   1. From the dialog box, select **OK.**
   2. The system sends an email to all users previously listed in the dialog box, reminding them to review remaining categories.

   **Note:** *The email sent to each Reviewer lists the names of all remaining categories.*

## How do I remove a Vendor?

1) From the **Prequalification** menu of the Navigation Bar, select **Form Administration.**
   The **Form Administration** page displays.
2) Select the **Row Menu**.
   A drop-down menu appears.
3) From the drop-down menu, select **Remove**.
   A **Confirm** dialog box appears.
4) From the dialog box, select **Yes**.

**Note:** *Removed Vendors still display in the table. The Vendor column will include a* **(REM)** *tag.*

# Reports

## In This Section



## How do I generate a PDF for the Financial or Safety Information sections?

When you generate a PDF of the information present in the Financial Information or Safety Information sections, you can choose to use either the submitted or overridden data.

To generate a PDF:

1) Navigate to the Financial Information or Safety Information category.

   You can access these categories from the following locations:

   - Form Administration
   - Vendor Approval
   - Submissions
   - Submitter Status.

2) In the line for the category, select the PDF icon.

   A dialog box displays.

3) In the dialog box, choose to either export the original submitted values for the category, or the overridden values you entered while reviewing the form.

4) Select **Ok**.

   - The dialog box closes.
   - PQM generates a PDF document with your chosen values.
   - If you chose to generate a PDF with overridden values, the PDF will include footnotes.

## How do I generate a Category Detail report?

The **Category Detail** report lists all categories for all prequalification forms.

1) From the **Prequalification** menu of the Navigation Bar, select **Submissions**.
   The **Submissions** page displays.

2) From the header of the **Submissions** table, select **Export**.
   An **Export** dialog box appears.

3) Select **Export Category Detail Report**.
   A dialog box appears, confirming the system will send an email to to the email address on file.
4) From the email, select the link.

> **Note:** *The link expires in 24 hours. After 24 hours, you will need to generate the report again.*

5) Enter your **User Name** and **Password** in the prompt.
   An **Opening categoryDetailReport** dialog box appears.
6) Open the report in a program that reads .XLS files.

> **Notes:**
>
> - *This is an Excel file type.*
> - *The* **Open with** *option is selected by default. To save the file without opening it, select* **Save File** *before selecting* **OK**.

### Report Output

- Vendor Name
- Vendor First Name + Last Name
- Vendor Email
- Vendor Tags
- Vendor Qualification Status
- Vendor Activities
- Vendor Expiration Status
- Request Name
- Categories Submitted
- Categories Reviewed
- Total Categories
- Expiration Date
- Additional Insurance
- Affiliations, Associations, and Awards
- Automobile Insurance
- Banking Information
- Bonding
- Business Classification Information
- Capabilities
- Contractor's Pollution Insurance
- Employees
- Excess Liability Insurance
- Financial Information
- Financial Statement Approver
- General Information

- General Liability Insurance
- Generic
- Geographic Areas
- LEED Certification
- Licenses
- Litigation Information
- Performance Information
- Product Service Segments
- Professional Liability Insurance
- Quality Assurance
- References
- Safety Information
- Safety Questionnaire
- Sign Qualification
- Software
- Subcontractor Trades
- Union Agreements
- Workers' Compensation Insurance

## How do I generate a Form Request Export report?

The **Form Request Export** report includes all available data from the **Form Administration** page.

1) From the **Actions** drop-down menu on the **Form Administration** page, select **Export**.
   A **Form Request Export** dialog box appears, confirming the system will send an email to the email address on file.
2) From the email, select the attached report.
3) Choose to open the report in a program that reads .XLS files.

**Note:**

- *This is an Excel file type.*
- *The* **Open with** *option is selected by default. To save the file without opening it, select* **Save File** *before selecting* **OK***.*

### Report Output

- Vendor
- Form
- Form Inactive
- Vendor Removed
- Invited Date
- Requested Date
- Version
- Total Section Count

- Submitted Section Count
- Submitted Section Percentage
- Submitted Date
- No. of Days taken for Submission
- Reviewed Section Count
- Reviewed Section Percentage
- Reviewed Date
- Expires
- Qualification Status
- SCL
- ACL
- Workflow
- Activities
- Tags

## How do I generate a Submission report?

The **Submission** report includes prequalification information for all of your on-system Vendors.

1) From the **Prequalification** menu of the Navigation Bar, select **Submissions**.
   The **Submissions** page displays.
2) From the header of the **Submissions** table, select **Export**.
   An **Export** dialog box appears.
3) Select **Export Submission Report**.
   An **Opening Submissions.xlsx** dialog box appears.
4) Open the report in a program that reads .XLS files.

**Notes:**

- *This is an Excel file type.*
- *The* **Open with** *option is selected by default. To save the file without opening it, select* **Save File** *before selecting* **OK.**

### Report Output

- Vendor
- Request
- Submit
- Review
- Submitted
- Reviewed
- Tags/Activities
- Pending Submission
- Pending Review

## How do I generate a Vendor Approvals report?

Generate a report of all filtered approvals from the **Approval Landing Page**. The report includes both visible and hidden columns.

1) Navigate to the **Approvals Landing Page.**
2) (Optional) Filter select the **Approvals Landing Page** to limit the data presented in the report.
   a. Select the **Table Settings** button.

      A dialog box appears.
   b. In the dialog box, deselect the columns you do not wish to include in the report.
3) Select the **Export** button.
4) A dialog box appears, confirming the system will send an email to the address on file.
5) From the email, select the link.

> **Note:** *The link expires in 24 hours. After 24 hours, you will need to export the report again.*

6) If prompted, enter your **User Name** and **Password**.
7) Open the report in a program that reads .XLS files.

> **Notes:**
>
> - *This is an Excel file type.*
> - *The* **Open with** *option is selected by default. To save the file without opening it, select* **Save File** *before selecting* **OK.**

### Report Output

- Vendor
- Status
- Activity
- Completed
- Request
- Workflow
- RMP

> **Note:** If **Yes**, the column lists the names of the RMPs.

- Notes
- Attachments
- Contract Size
- Scope of Work
- Vendor Rating
- Fin. Rating
- CDI Status

- SCL
- ACL
- Risk Rating
- Vendor Tags
- Tasked Users
- Diverse Business
- Union Affiliation
- Data Valid Until

## How do I export trade records from the Approvals page?

To export trade records from the **Approvals** page:

1) From the **Home** page, select the **Approvals** tab.
2) From the **Search** drop-down on the **Approvals** tab, select **Trade Codes**.
3) Select **Export**.

   The application sends you an email with a link to the generated report.

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