

Oracle
Textura
PQM Reviewer FAQs

Version 22
November 2022

Contents

About This Guide.....	5
Working in PQM	7
What are my search options when looking for a contact in my address book?	7
How do I search for approvals?	8
Can I see information from the Trades category on the Approvals page?.....	9
How do I format approval notes?	9
How do I review categories?	11
Can I update a category value as a Reviewer?.....	14
How do I change an expiration date?.....	16
How do I resend multiple categories?.....	19
How do I resend a single category?	21
Can I still see a category's data when I resend it to the submitting organization?	23
Will the workspace tell me if a category is not applicable?	24
How do I write a private note?	24
Will the system tell me when someone uploads a new attachment or posts a new note?.....	25
How do I rate a category without reviewing it?	25
Is there an easy way to compare original and overridden values?	26
How do I view overridden safety values?	26
How do I view attachments?.....	27
How do I add a Risk Mitigation Plan attachment to an Approval?	28
How do I use Vendor Flags?.....	29
How do I generate a Vendor Approvals report?	30
Can I print all categories at one time?	31
Copyright.....	34

About This Guide

This guide addresses questions frequently asked by prequalification Reviewers when using the Oracle Pre-Qualification Management (PQM) solution to review prequalification forms. Typically, General Contractors, Owners, or Developers using PQM to prequalify organizations should use this guide.

Working in PQM

In This Section

What are my search options when looking for a contact in my address book?	7
How do I search for approvals?	8
Can I see information from the Trades category on the Approvals page?.....	9
How do I format approval notes?.....	9
How do I review categories?	11
Can I update a category value as a Reviewer?	14
How do I change an expiration date?	16
How do I resend multiple categories?.....	19
How do I resend a single category?.....	21
Can I still see a category's data when I resend it to the submitting organization?	23
Will the workspace tell me if a category is not applicable?.....	24
How do I write a private note?	24
Will the system tell me when someone uploads a new attachment or posts a new note?	25
How do I rate a category without reviewing it?.....	25
Is there an easy way to compare original and overridden values?	26
How do I view overridden safety values?.....	26
How do I view attachments?.....	27
How do I add a Risk Mitigation Plan attachment to an Approval?	28
How do I use Vendor Flags?	29
How do I generate a Vendor Approvals report?	30
Can I print all categories at one time?	31

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.

How do I search for approvals?

The **Approvals Landing Page** includes a search bar with drop-down search limits:

<ul style="list-style-type: none">▶ Vendor▶ Activity▶ Status▶ CDI Status▶ Workflow▶ Tasked Users▶ Request▶ Tag	<ul style="list-style-type: none">▶ RMP▶ SCL ≥▶ ACL ≥▶ Scope of Work▶ Diverse Business▶ Union Affiliation▶ Trade Codes & Description
---	--

Select a limit from the drop-down menu to constrain search results to a given subject.

Note: *Both Single Contract Limit (SCL) and Aggregate Contract Limit (ACL) choices search for approvals with contract limits greater than or equal to the entered amount.*

Enter partial information to see a broad list of results. Partial searches show all items that contain the text entered in the search bar.

When typing, the auto-complete feature shows matching results in a drop-down list. Select an item from the list to narrow the filter to a table of exact matches.

Further specify search limits by including an AND or an OR filter.

ORACLE | PQM

The screenshot shows the Oracle PQM interface. At the top, there are navigation tabs: Home, CDI, Prequalification, Address Book, Management, and Subscriptions. Below these are two tabs: Tasks and Approvals. The Approvals tab is active. In the search area, there is a dropdown menu for 'Status' with 'Conditionally Approved' selected. To the right is a checkbox for 'Recent Approvals'. Below the search bar, there are filter buttons: 'Vendor: City Style Interiors x', 'AND Status: Approved x', 'OR Conditionally Approved x'. Two red arrows point to the 'AND' and 'OR' filter buttons. Below the filters, there is a pagination bar showing 'Page 1 / 1'. A table with the following columns is displayed: Vendor, Status, Activity, Completed, and Request. The table contains one row: City Style Interiors, Approved (with a green checkmark), Baseline, In Progress, and City Style Interior. Below the table is another pagination bar showing 'Page 1 / 1'. At the bottom of the page, there is a copyright notice: 'Copyright © 2009, 2016, Oracle and/or its affiliates. All rights reserved.' and links for 'Terms & Conditions' and 'Privacy Policy'.

The system uses an AND filter when a search includes more than one selected search limit. To use the OR filter, enter more than one item in a limit's search bar.

Users can also select the **Recent Approvals** check box to limit the search results to only the most recent and pending approvals. The system saves the **Recent Approvals** filter option between sessions.

Can I see information from the Trades category on the Approvals page?

You can view information from the **Trades** category in the table on the **Approvals** page. To see this information, choose to show the **Code** and **Description** columns in the **Table Settings**.

How do I format approval notes?

Reviewers can leave approval notes when completing the Vendor Approval process.

To leave and format an approval note:

- 1) Once you reviewed the Submitter content, select the **Complete** button.
A **Complete Approval** dialog box displays.
- 2) In the dialog box, enter a comment about the approval. Comments cannot exceed 1000 characters.

3) (Optional) Format the text for a cleaner look.

Available formatting options include:

- ▶ Bold
- ▶ Italic
- ▶ Underline
- ▶ Bulleted List
- ▶ Numbered List
- ▶ Highlight
- ▶ Font Color.

4) (Optional) Review available attachments when writing an approval comment.

To see available attachments, select the **Attachment** tab on the page. A list of available attachments display.

5) In the dialog box, select the **Complete** button.

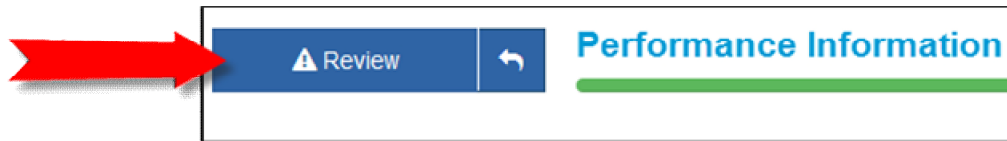
The dialog box closes and a message confirming you have completed the approval displays.

Note: Approval and completion notes are included in email PQM sends upon Vendor Approval completion.

How do I review categories?

Individual Categories

- 1) Select the blue **Review** button for the category you want to review.



A **Review Section** dialog box appears.

Review Section

Complete your Review by leaving a Note and if applicable a Rating.

Rating

Note (max. 1000 characters)

☐ **Make Note Public**

Expiration Date

dd-MMM-yyyy

Review

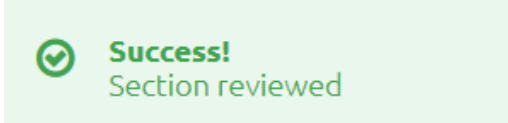
Cancel

- 2) (Optional) Use the **Rating** drop-down list to assign a rating to the submitting organization's form.
- 3) (Optional) Enter text in the **Note** field.

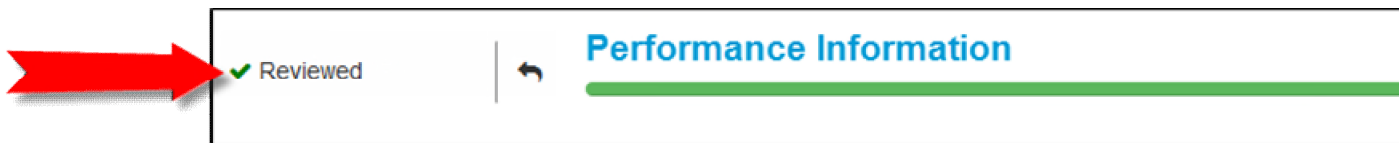
Note: Select the **Make Note Public** check box to share the note outside of your organization. Deselect the check box to create a private note for your organization.

4) Select **Review**.

A **Success! Section Reviewed** message appears at the top of the page.



The **Review** button changes to a **✓Reviewed** message.

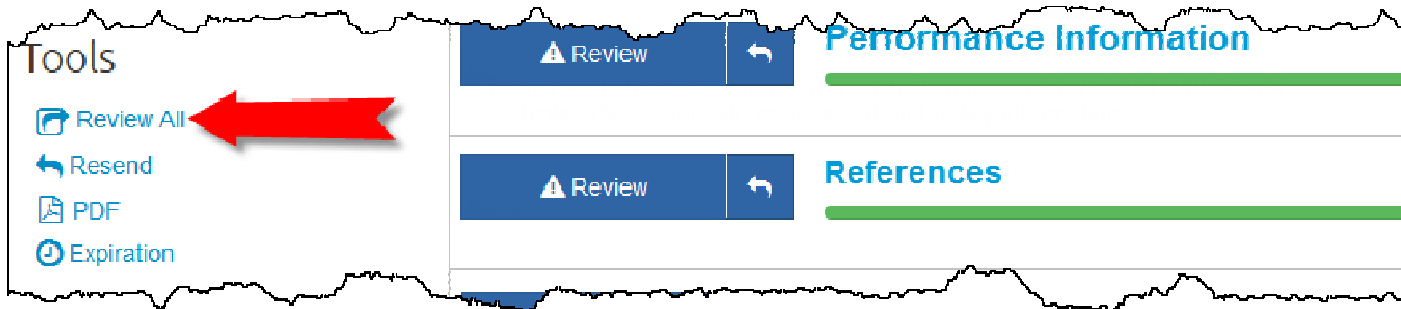


The header shows the category's expiration date instead of the questions remaining.

Note: The workspace also organizes reviewed categories by their expirations.

All Categories

- 1) Select  **Review All** under the **Tools** section.



A **Review All Sections** dialog box appears.

Review All Sections

Are you sure you want to Review All Sections? You are currently able to review **9** of **15** sections.

You can leave a Note that will be added to each section being reviewed.

Note (max. 1000 characters)

☐ **Make Note Public**

Review All

Cancel

Note: The dialog box shows how many sections are available for review.

- 2) (Optional) Enter text in the **Note** field.

Note: Select the **Make Note Public** check box to share the note outside of your organization. Deselect the check box to create a private note for your organization. This note will be applied to each section available for review.

3) Select **Review All**.

Reviewed categories shift to the bottom of the page. The **Review** buttons change to **✓Reviewed** messages.

Can I update a category value as a Reviewer?

A Reviewer can enter or adjust the value in a financial prequalification category field. When an override value is entered, the field is highlighted and an icon appears next to it. The Reviewer can use the icon to add a comment in an **Override Comment** dialog box.

The screenshot shows a dialog box titled "Override Comment". At the top, there are "Save" and "Cancel" buttons. Below them, the "Submitted Value" is displayed as "1". The "Overridden Value" is displayed as "55". A text area labeled "Comment" contains the text "Additional funds identified". At the bottom of the dialog, it shows "Last Modified By: Steve" and "Last Modified On: 02-Feb-2017 9:38:57 AM".

Any user can hover over the icon to see the original value, the modification date, override comments, and the user who modified the value.

Review
Financial Info

0 1

0 questions re

i The Financial Year End for this vendor is **Jan**.

▼ Financial Statements



Number of Financial Periods to Collect: 3

Type: Annual

Financial Statements are: Audit

How often are they prepared? Annually

Resto

	<input type="checkbox"/> N/A	<input type="checkbox"/> N/A	<input type="checkbox"/> N/A
Cash	 1,234 *	0 *	
Cash & Cash Equivalents	 55 *	1 *	
Trades Receivable		1	
Unbilled Work in Progress (Underbillings)		1	
Adjustment to Current Assets		1	
Other Current Assets		1	
Total Current Assets		0	
Property and Equipment		1	

Cash & Cash Equivalents

Submitted Value

1

Comment

Additional funds identified

Last Modified By

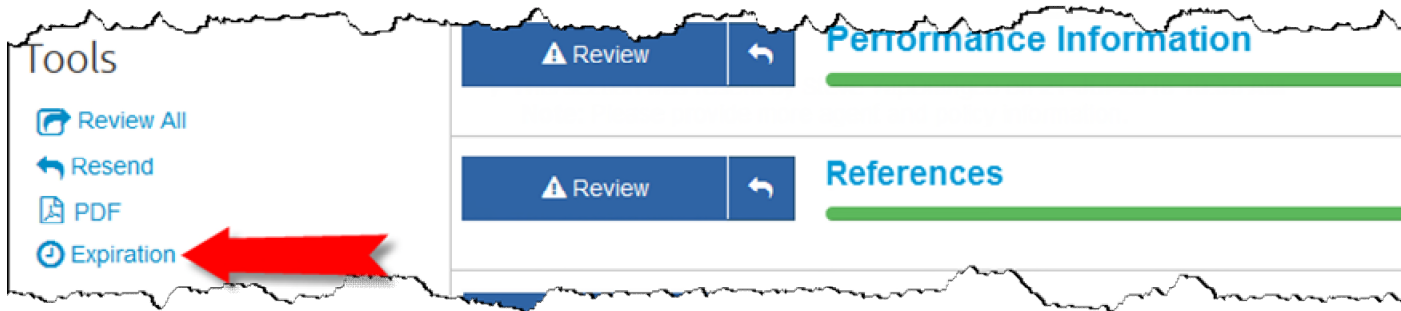
Steve

Last Modified On

02-Feb-2017 9:38:57 AM

How do I change an expiration date?

- 1) Select  **Expiration** under the **Tools** section.



An **Expirations** dialog box appears.

Expirations

In each category below, please select an expiration date or choose a date to apply to all categories.

Set an expiration date for all possible categories.

10-Jun-2017

Apply

Category Name	Current Expiration	New Expiration
Bonding		<div>10-Jun-2017</div> <div></div>
Employee Information		<div>10-Jun-2017</div> <div></div>
Litigation Information		<div>10-Jun-2017</div> <div></div>
Performance Information		<div>10-Jun-2017</div> <div></div>
Business Classification Information	Not Reviewed	
Capabilities	Not Reviewed	

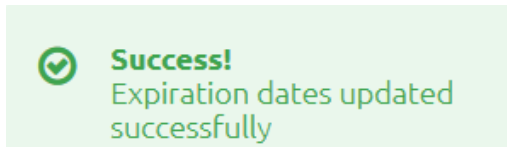
Update

Cancel

2) Change either:

- ▶ **All Categories** – Use the calendar widget at the top of the dialog box to choose a new expiration date, and select **Apply** to set it across all reviewed categories

- ▶ **One Category** – Use the calendar widget in a category's row to apply a new expiration date to that category.
- 3) Select **Update**.
The dialog box closes and a **Success! Expiration dates updated successfully** message appears at the top of the page.



Note: Reviewers can also change the expiration date when reviewing a category.

How do I resend multiple categories?

Use one tool to manage all sections.

- 1) Select **Resend** under the **Tools** section. A **Resend Sections** dialog box appears.




- 2) In the **Resend** dialog box, select each section to resend.

Resend Sections
✕

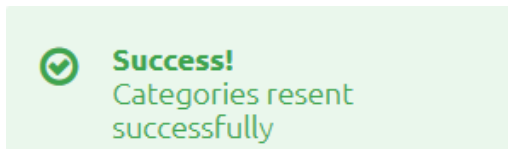
Choose the sections you want to resend. Any note you leave will be visible to the Subcontractor.

<input type="checkbox"/> Section	Status	Note (max. 1000 characters)
<input type="checkbox"/> Bonding	Reviewed	
<input type="checkbox"/> Business Classification Information	Pending Review	
<input type="checkbox"/> Capabilities	Pending Review	
<input type="checkbox"/> Employee Information	Reviewed	
<input type="checkbox"/> Financial Information	Pending Review	
<input checked="" type="checkbox"/> General Insurance	Pending Review	Please update this form. The document expires soon.
<input type="checkbox"/> Licenses	Pending Review	
<input type="checkbox"/> Litigation Information	Reviewed	

Resend
Cancel


- 3) (Optional) Include a note.
Enter text in the **Note** field. Submitting organizations will see the note next to a resend  (orange arrow icon) in the category's heading.
- 4) Select **Resend**.

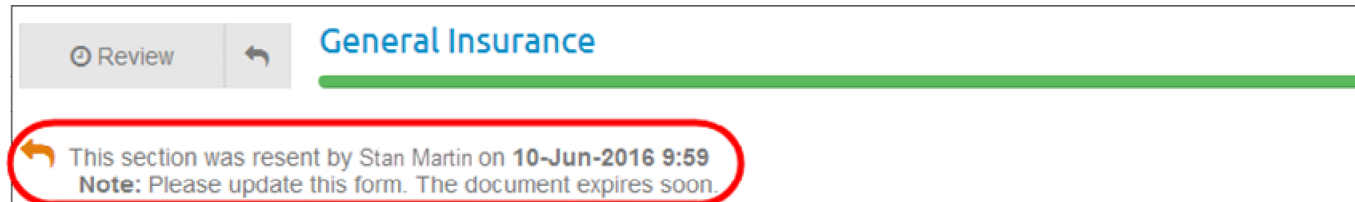
- ▶ The dialog box closes and a **Success! Categories Resent successfully** message appears at the top of the page.




- ▶ The **Review** button changes to **Review**.



- ▶ The resend  (orange arrow icon) appears in the category heading. It is available in both your workspace as well as the submitting organization's task list.




How do I resend a single category?

Each category heading includes a resend  (blue arrow) button.



- 1) Select the resend  (blue arrow) button.
A **Resend Section** dialog box opens.

Resend Section 

Please confirm you want to resend the section. The note you leave will be visible to the Subcontractor.

Note (max. 1000 characters)

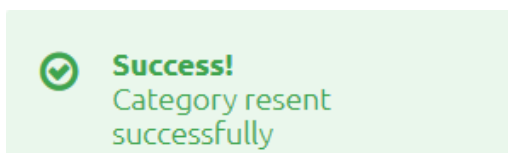
Resend




Cancel

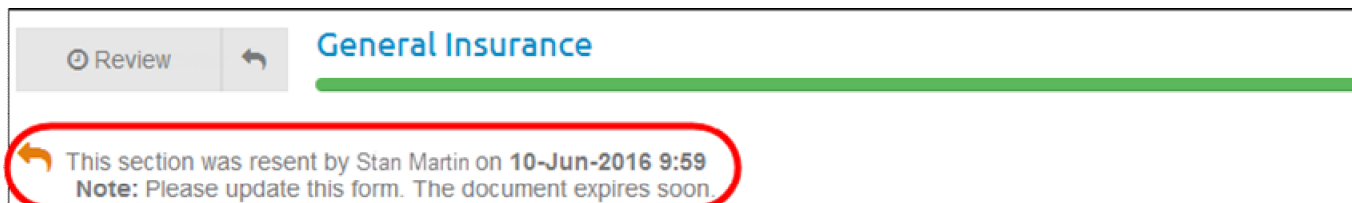
Note: The blue resend button turns white if you already reviewed the category.



- 2) (Optional) Enter text in the **Note** field.
- 3) Select **Resend** in the dialog box.
 - ▶ The dialog box closes and a **Success! Category resent successfully** message appears at the top of the page.



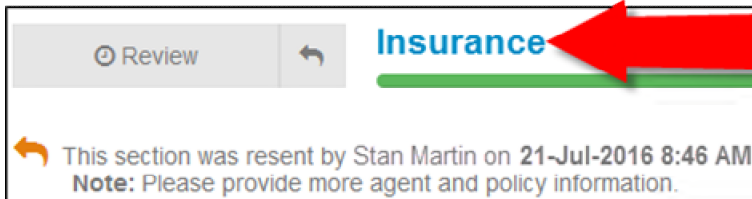
- ▶ The  **Review** button changes to  **Review**.
- ▶ The resend  (orange arrow icon) appears in the category heading. It is available in both your workspace as well as the submitting organization's task list.



Can I still see a category's data when I resend it to the submitting organization?

Yes, the system saves a resent category's most recently submitted data to the workspace.

- 1) Select a category.



Review Insurance

This section was resent by Stan Martin on 21-Jul-2016 8:46 AM
Note: Please provide more agent and policy information.

The category expands.

- 2) View resent data.

ORACLE | PQM

Home CDI Prequalification Address Book Management Subscriptions

City Style Interiors



SUBMITTED
50%
REVIEWED
13%

City Style Interiors Prequa...

Submitting Company

City Style Interior

Your Contact Info

Sabrina Cole

Submitter Contact

Stan Martin

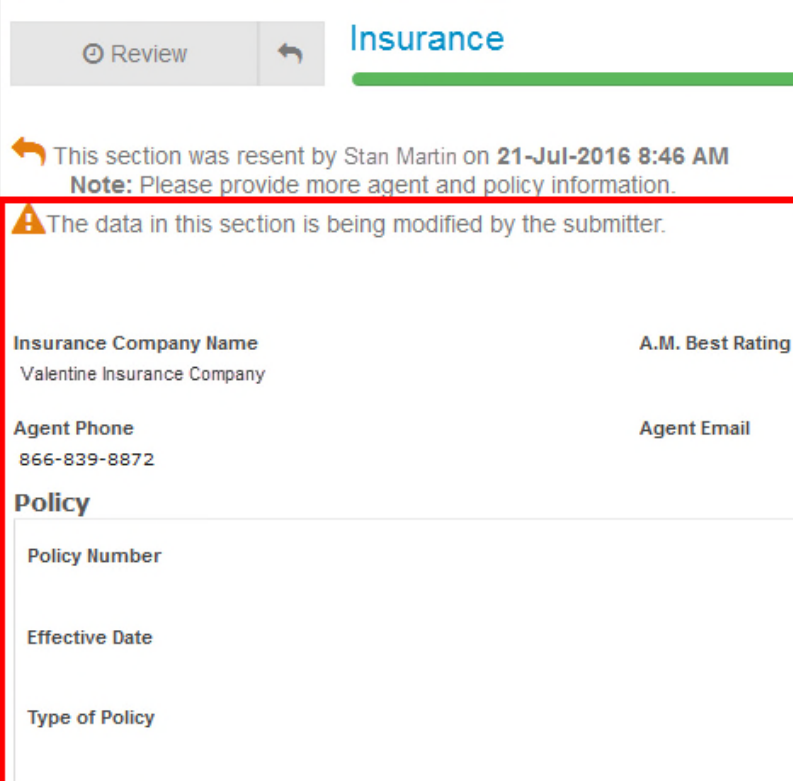
Tools

Review All

Resend

PDF

Expiration



Review Insurance

This section was resent by Stan Martin on 21-Jul-2016 8:46 AM
Note: Please provide more agent and policy information.

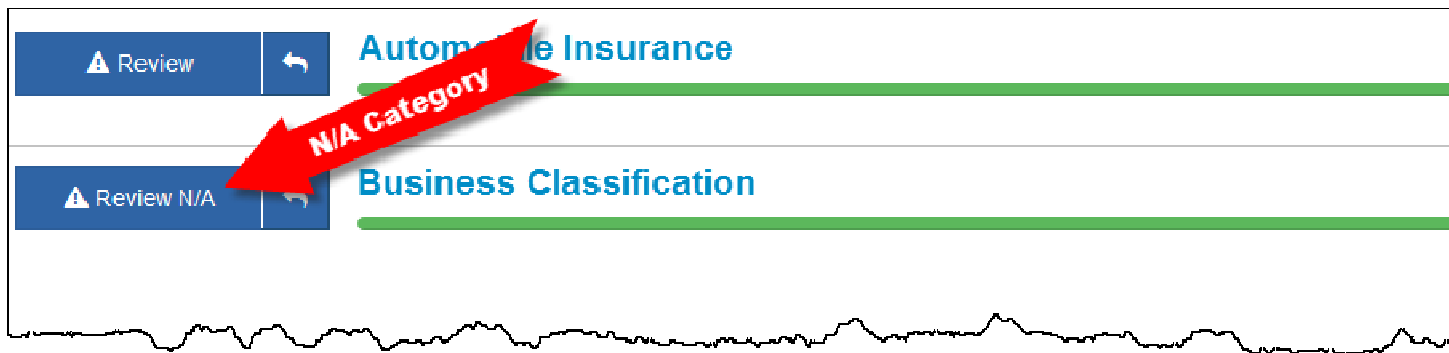
The data in this section is being modified by the submitter.

Insurance Company Name	A.M. Best Rating
Valentine Insurance Company	
Agent Phone	Agent Email
866-839-8872	
Policy	
Policy Number	
Effective Date	
Type of Policy	




Note: An alert displays, signifying the data may be out-of-date. This alert disappears once the Submitter resubmits the category.

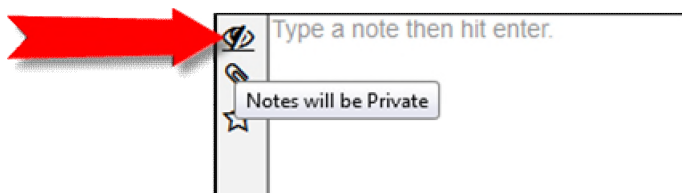
Will the workspace tell me if a category is not applicable?

Yes, the **Review** button will say **Review N/A** if a category is not applicable. All **Review N/A** categories also include a note from the submitting organization.



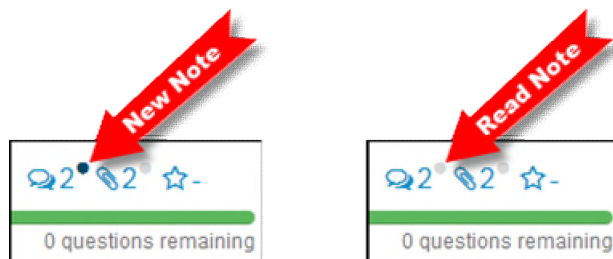
How do I write a private note?

When entering a note, select the  (eye icon) to toggle between  (public) and  (private) options. Public notes display in the submitting organization's workspace. Only other members within your organization can see private notes.



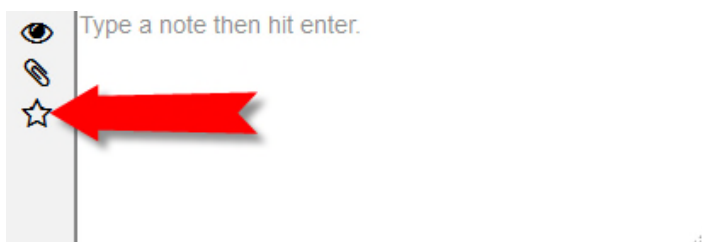
Will the system tell me when someone uploads a new attachment or posts a new note?

Yes. The system alerts users to new notes and attachments through its category tools. When a user uploads a new attachment or writes a new note, the ● (gray circle icon) next to the number of notes or attachments turns blue. Once notes or attachments are opened, the ● (blue circle icon) turns back to gray.



How do I rate a category without reviewing it?

- 1) Select a category's name to expand it.
- 2) Select the ☆ (star icon) in the workspace.



A **Rating** dialog box opens.

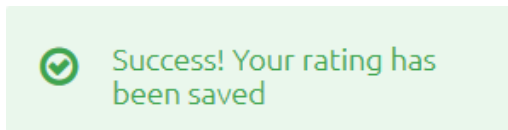
Rating

No Rating ▼

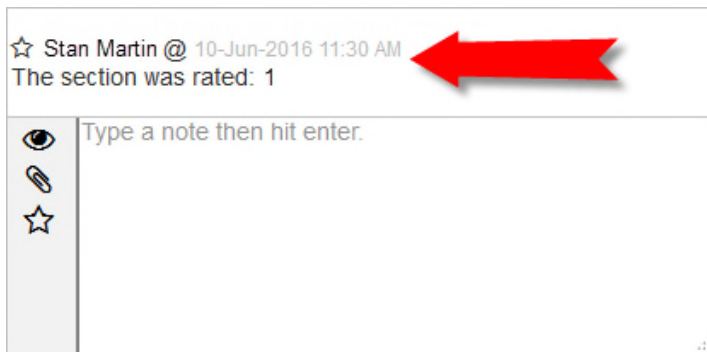
Update Cancel

- 3) Use the drop-down to choose a rating on a scale of **1** (the lowest rating) to **5** (the highest rating).
- 4) Select **Update**.

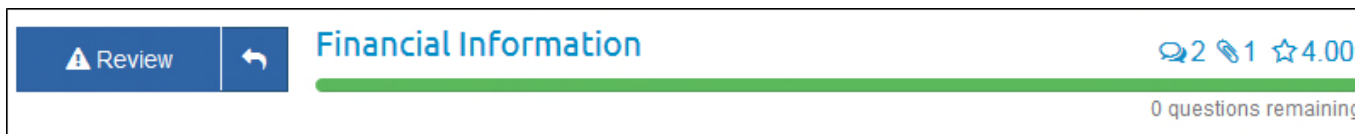
- ▶ A **Success! Your rating has been saved** message appears at the top of the page.



- ▶ Ratings display in the right panel above the note field.



- ▶ Category headings include the average rating.



Note: The system averages all given ratings within a category.

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.

How do I view attachments?

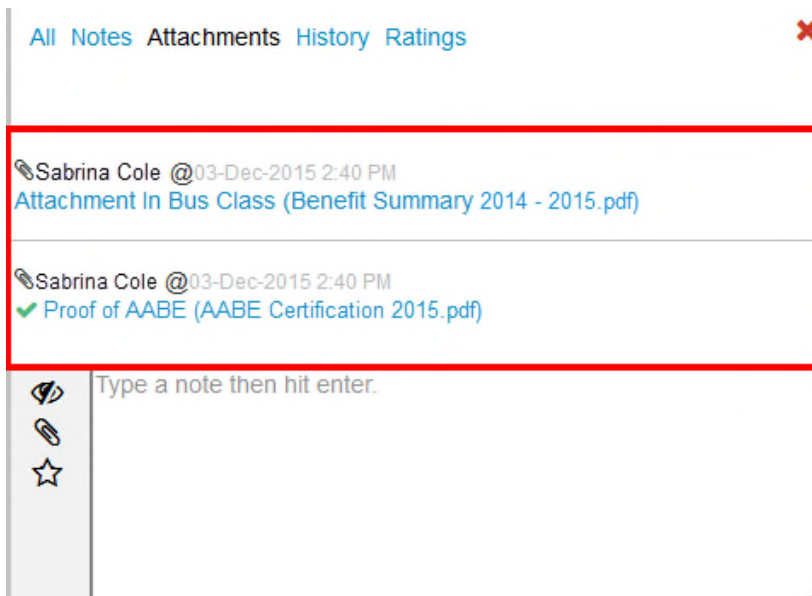
Each section includes attachment information at the top of the category heading.

Note: The  (gray circle icon) next to the number of attachments turns blue when a user uploads a new document.

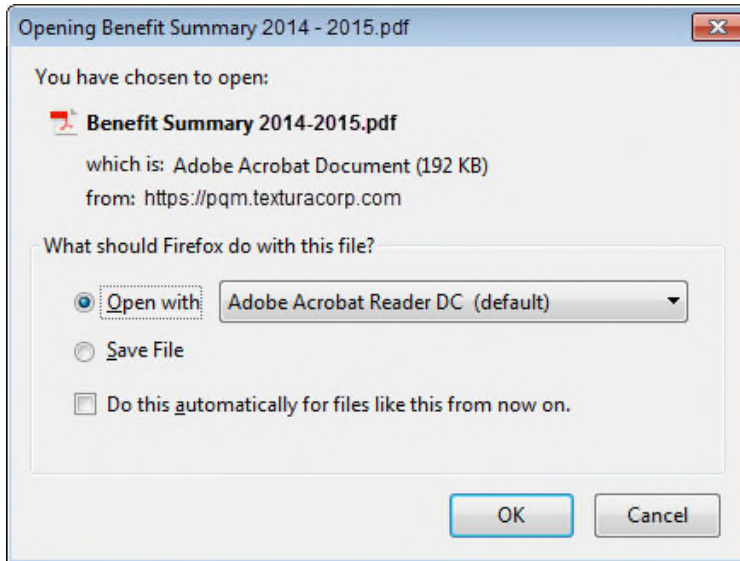
- I. Select the  (paperclip icon) in a category heading.

 N/A'. The main section is titled 'CLASSIFICATION' and contains 'AABE (African American Business)'." data-bbox="168 320 1000 475"/>

The names of all related attachments appear in the right frame.



2. Select an attachment's name.



An **Opening [Document Name]** dialog box appears.

3. Select **Open with**.
Note: *The program often defaults to Adobe Reader®.*
4. (Optional) Use the drop-down list to choose a program to open the file.
5. Select **OK**.
The attachment opens in your selected program.

How do I add a Risk Mitigation Plan attachment to an Approval?

To include a **Risk Mitigation Plan (RMP)** on a single project, attach a document to the **Approval Attachment** section.

Note: *Users can also add an attachment to the Vendor Attachments section to assign the document to the entire organization.*

- 1) From the **Vendor** column on the **Approvals Landing Page**, select a Subcontractor name.
The **Vendor Dashboard** opens.
- 2) Select the **Attachments** tab.
- 3) Under the **Approval Attachments** section, in the **Description** field, enter a description for the RMP document.
- 4) Select **Select File**.
A **File Upload** dialog box appears.
- 5) Navigate to the file to upload, and select **Open**.
The dialog box closes, and the document name appears next to the **Select File** button.

6) Select **Attach**.

A **Success** message appears at the top of the page, and information about the document displays in an **Approval Attachments** table.

Document information includes:

- ▶ **File**—Name of the file
- ▶ **Description**—Manually entered description
- ▶ **Type**—An icon representing the type of file uploaded (e.g., .pdf .docx, etc.)
- ▶ **Date**—Document upload date
- ▶ **User**—Name of the user who uploaded the document.

How do I use Vendor Flags?

As a Risk Manager, flag a Vendor to alert Approvers to potential risks.

Flag a Vendor

- 1) From the **Tasks Landing Page**, select an approval task.
The **Vendor Dashboard** appears.
- 2) Select the white **Vendor Flag** next to the Vendor's name.
A **Comment** dialog box appears.
- 3) In the dialog box, select the white **Vendor Flag** icon to toggle the flag from **Off** to **On**.
When **On**, the **Vendor Flag** turns red.
- 4) Enter text in the **Comment** field.

Note: *Users can only enter and save one comment to the **Vendor Flag**.*

- 5) (Optional) Select the **X** to cancel the **Vendor Flag**.
- 6) Select the **Floppy Disk** icon to save the flag and comment.
A **Success! Vendor Flag saved** message appears at the top of the page.

View Vendor Flag Information

Approvers see the **Vendor Flag** on the **Vendor Dashboard**, **Approvals Landing Page**, and **Form Administration** page.

From the **Vendor Dashboard**:

- 1) Select the red **Vendor Flag** next to the Vendor's name.
A **Comment** dialog box appears.
- 2) View **Vendor Flag** information:
 - ▶ **Comment**—Manually entered user text
 - ▶ **Last Modified By**—Name of the user who flagged the Vendor
 - ▶ **Last Modified On**—Date and time the Vendor was flagged.
- 3) (Optional) Enter a new comment.
 - I. Delete existing text.

2. Enter a new comment.
3. Choose the **Floppy Disk** icon to save the comment.
The dialog box closes and a **Success! Vendor Flag** saved message appears at the top of the page.

From the **Approvals Landing Page**:

When available, Approvers will always see a **Vendor Flag** next to a Vendor's name. Hover over the flag to see the Risk Manager's comment.

Note: *The Vendor Flag displays to each approval belonging to the flagged Vendor.*

Remove a Vendor Flag

From the **Vendor Dashboard**:

- 1) Select the red **Vendor Flag** next to the Vendor's name.
A **Comment** dialog box appears.
- 2) From the dialog box, choose the red **Vendor Flag** to toggle the flag from **On** to **Off**.
When **Off**, the **Vendor Flag** turns white.
- 3) Select the **Floppy Disk** icon to save changes.
The dialog box closes and a **Success! Vendor flag saved** message appears at the top of the page.

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

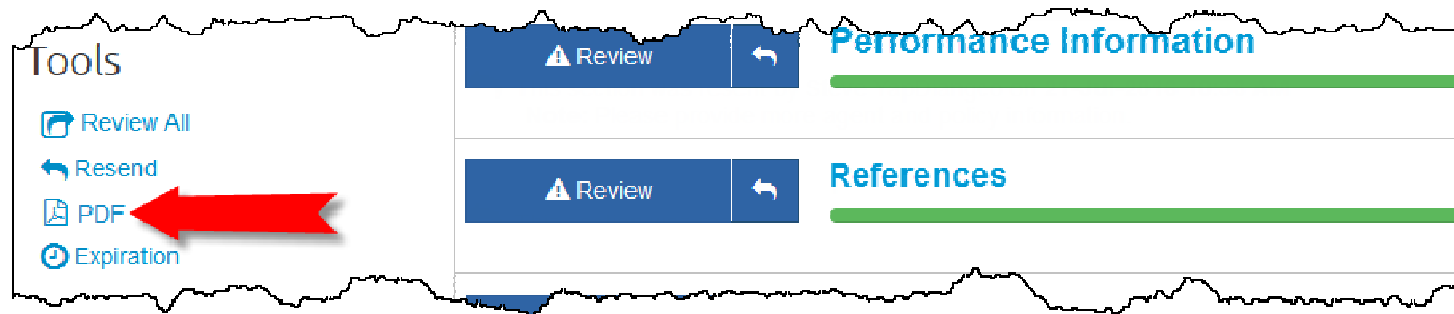
- Vendor
- Status
- Activity
- Completed
- Request
- Workflow
- RMP

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

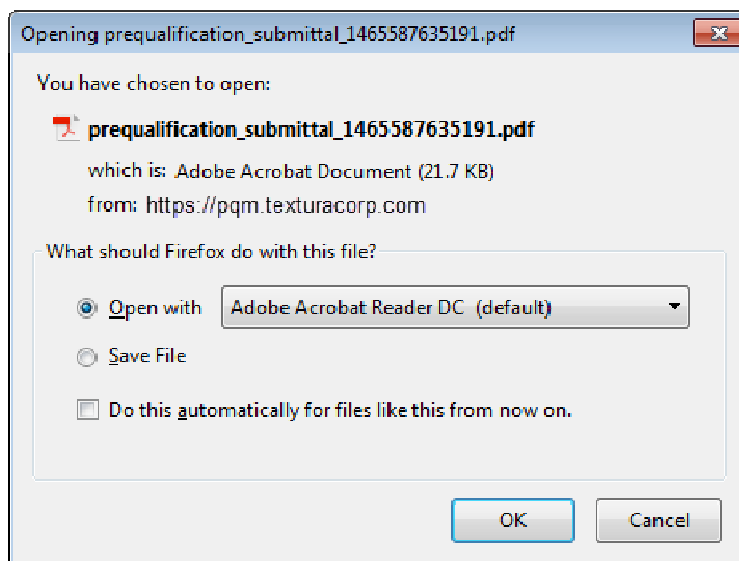
Can I print all categories at one time?

Yes, the solution collates all submitted sections into a single PDF file.



Note: The PDF will list the submitter attachments for a category, but the PDF file will not include the actual attachments.

1. Select  **PDF** under the **Tools** section.



An **Opening [Document Name]** dialog box appears.

2. Select **Open with**.

Note: The program often defaults to Adobe Reader®.

3. (Optional) Use the drop-down list to choose a program to open the file.
4. Select **OK**.
The file opens in your selected program.
5. Print the file.

Note: Use the program in which the file opens to print the file.

Copyright

Oracle Textura PQM Reviewer FAQs

Copyright © 2022, Oracle and/or its affiliates.

Oracle®, Java, and MySQL are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Inside are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Epyc, and the AMD logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, delivered to U.S. Government end users are “commercial computer software” pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, shall be subject to license terms and license restrictions applicable to the programs. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate failsafe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

This software or hardware and documentation may provide access to or information on content, products and services from third-parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services.