Oracle

Textura

PQM Reviewer FAQs

Version 22

November 2022

Contents

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?

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:

‣ Vendor	‣ RMP
‣ Activity	‣ SCL ≥
‣ Status	‣ ACL ≥
‣ CDI Status	‣ Scope of Work
‣ Workflow	‣ Diverse Business
‣ Tasked Users	‣ Union Affiliation
‣ Request	‣ Trade Codes & Description
‣ Tag	

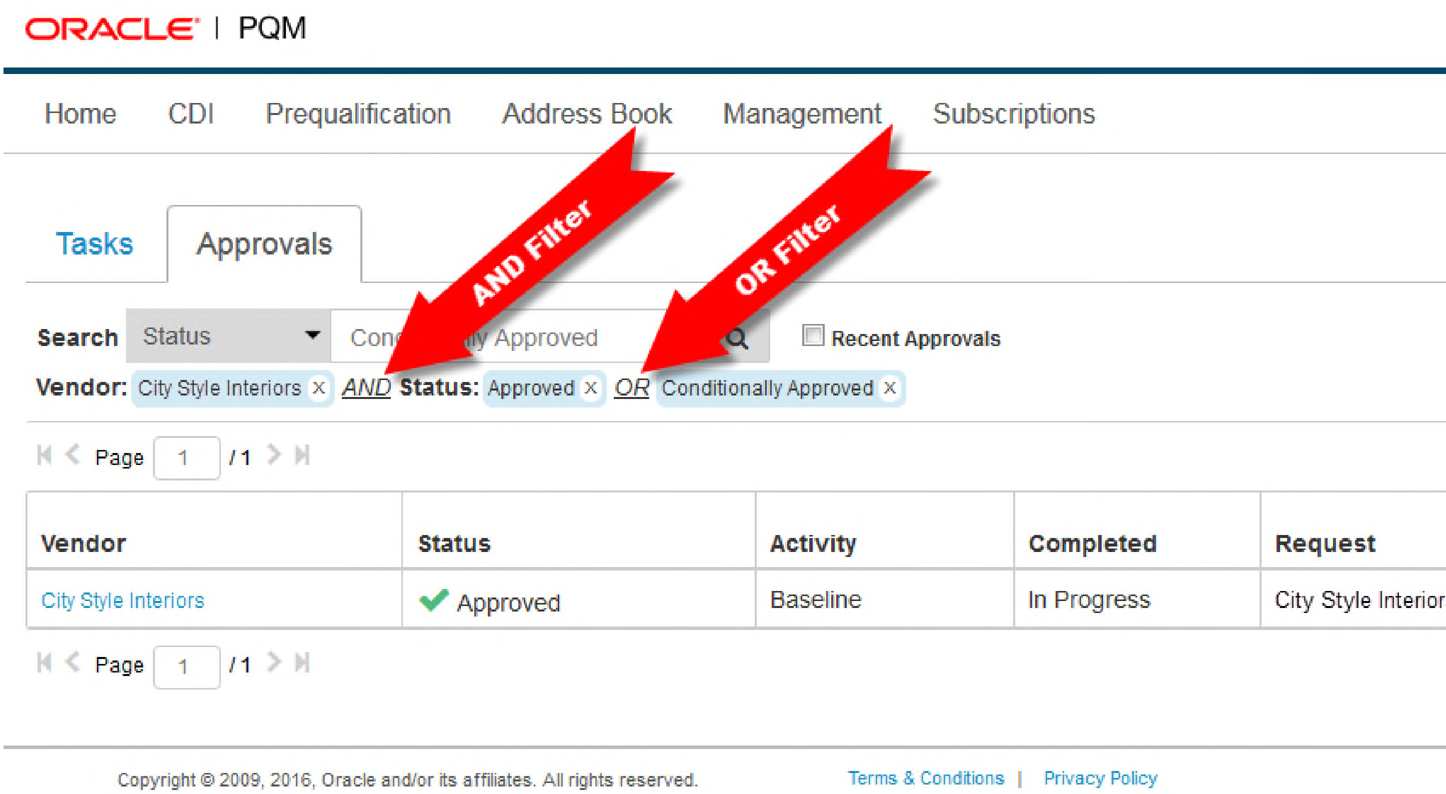
Select a limit from the drop-down menu to constrain search results to a given subject.

> **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.



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 C**omplete 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.

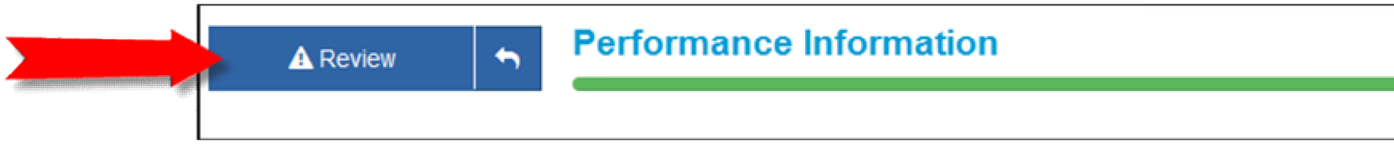
   The dialog box closes and a message confirming you have completed the approval displays.

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

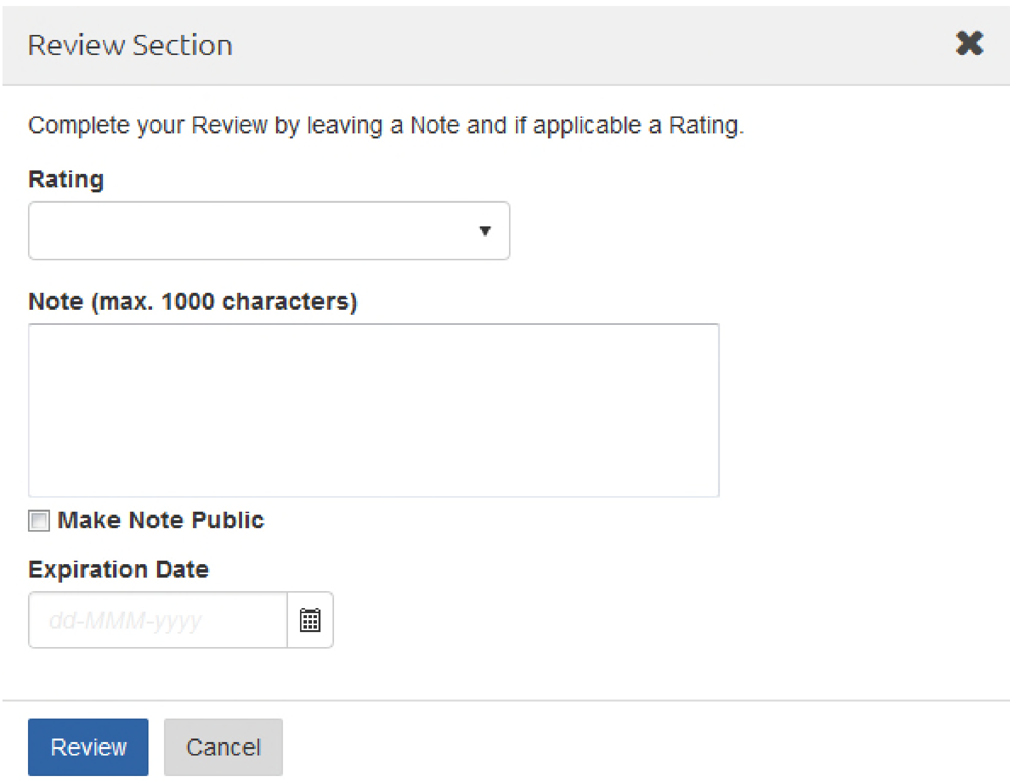
How do I review categories?

Individual Categories

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



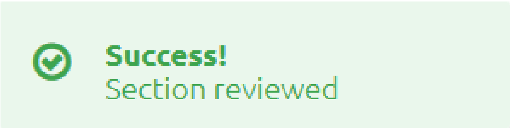
A **Review Section** dialog box appears.



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.



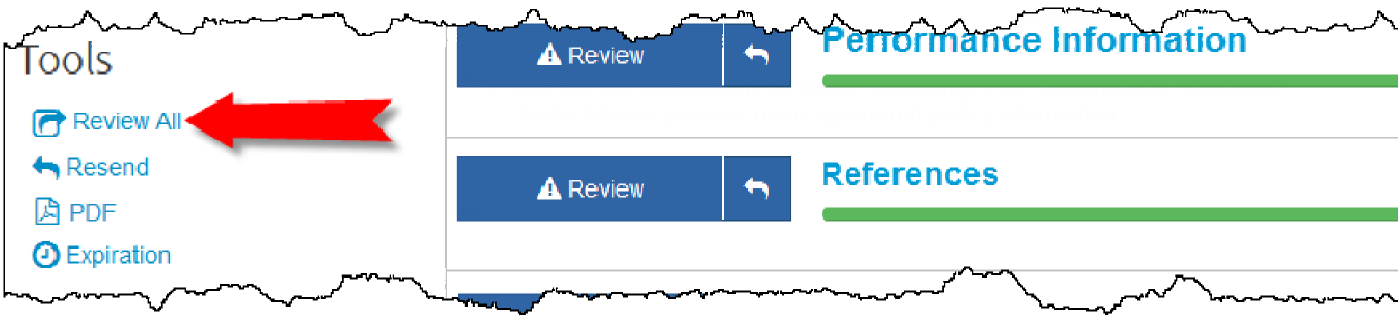
The **Review** button changes to a ✔**Reviewed** message.

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

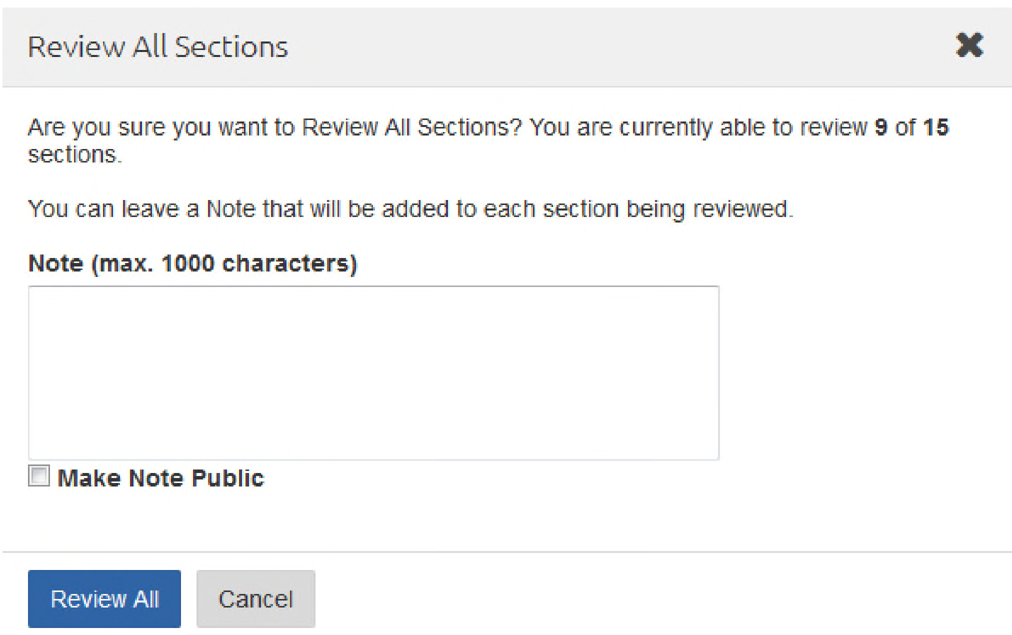
> **Note:** *The workspace also organizes reviewed categories by their expirations.*

All Categories

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



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



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

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

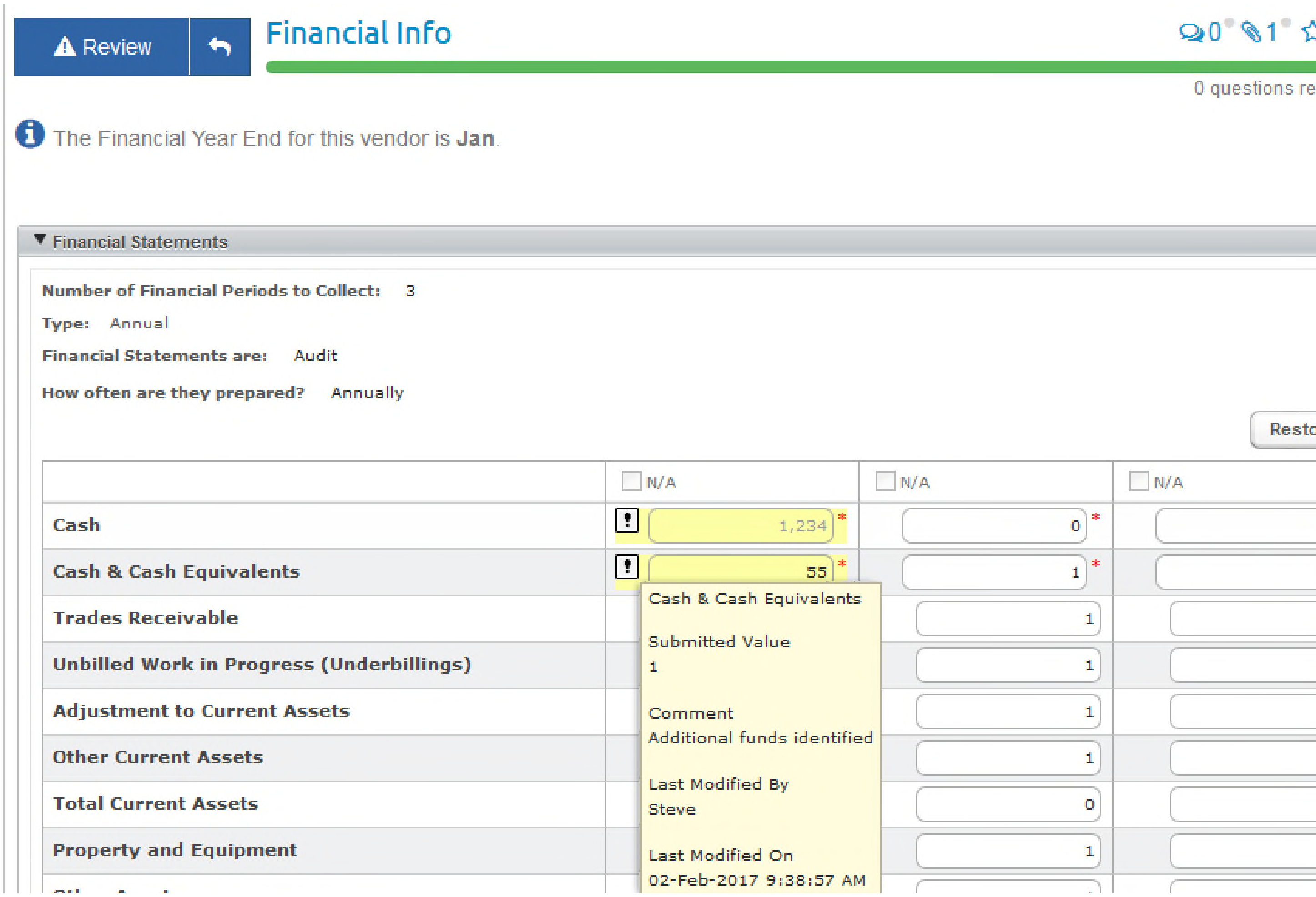
Note: *Select the* **Make Note Public** *check box to share the note outside of your organization. Deselect the check box to create a private note for your organization. This note will be applied to each section available for review.*

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?

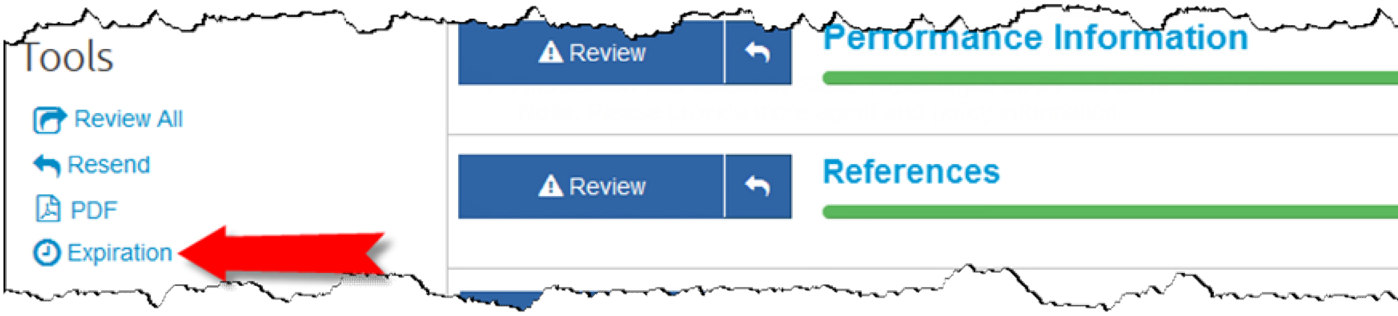
A Reviewer can enter or adjust the value in a financial prequalification category field. When an override value is entered, the field is highlighted and an icon appears next to it. The Reviewer can use the icon to add a comment in an **Override Comment** dialog box.

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

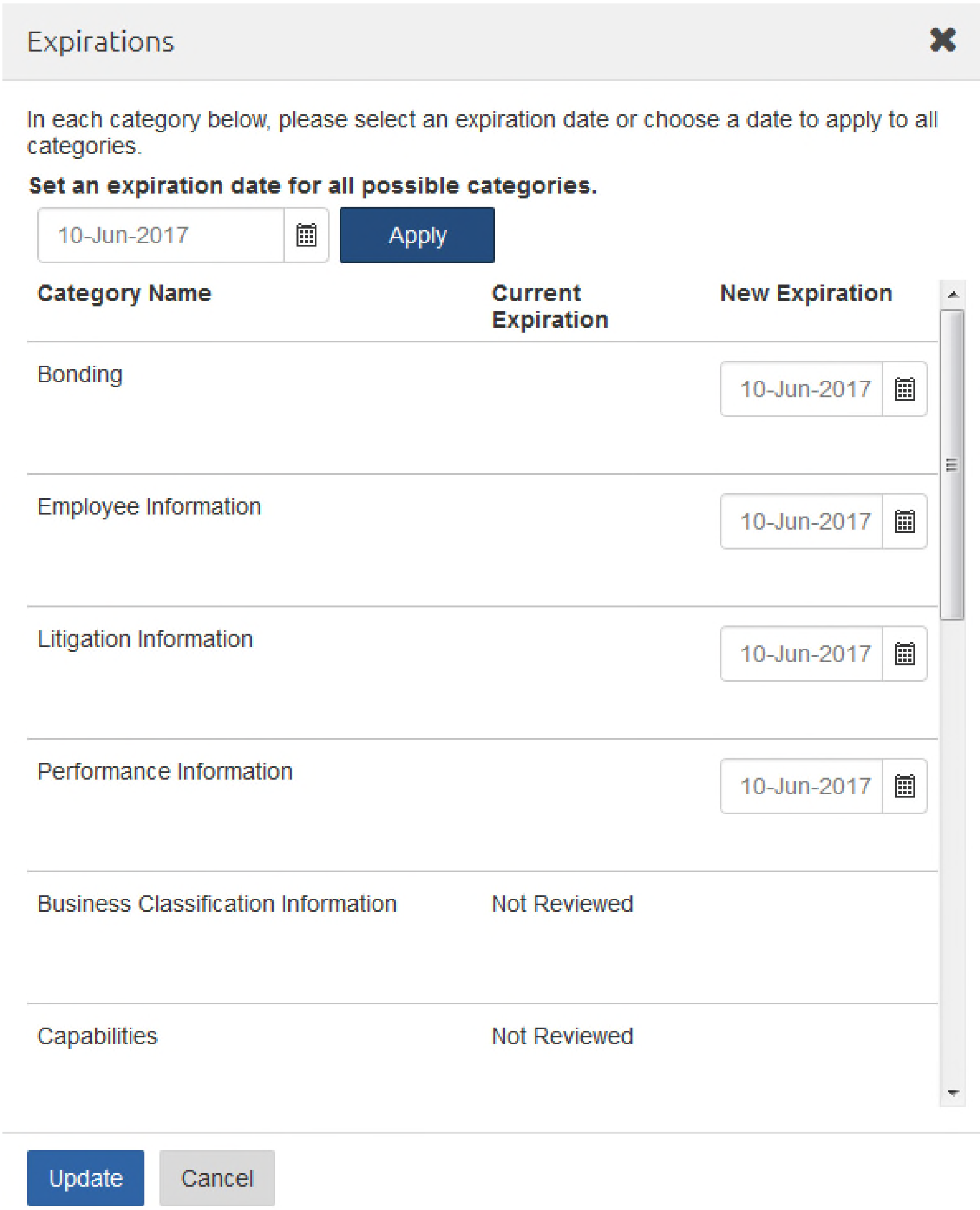


How do I change an expiration date?

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



An **Expirations** dialog box appears.

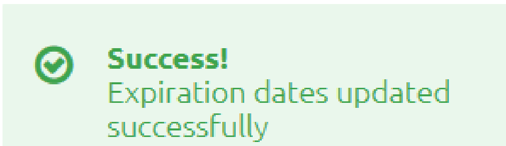


2) Change either:

- **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.

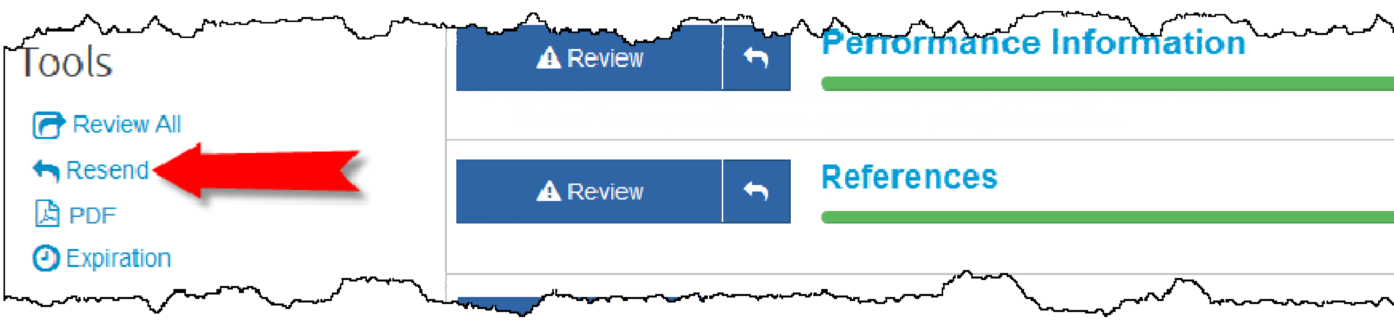


Note: *Reviewers can also change the expiration date when reviewing a category.*

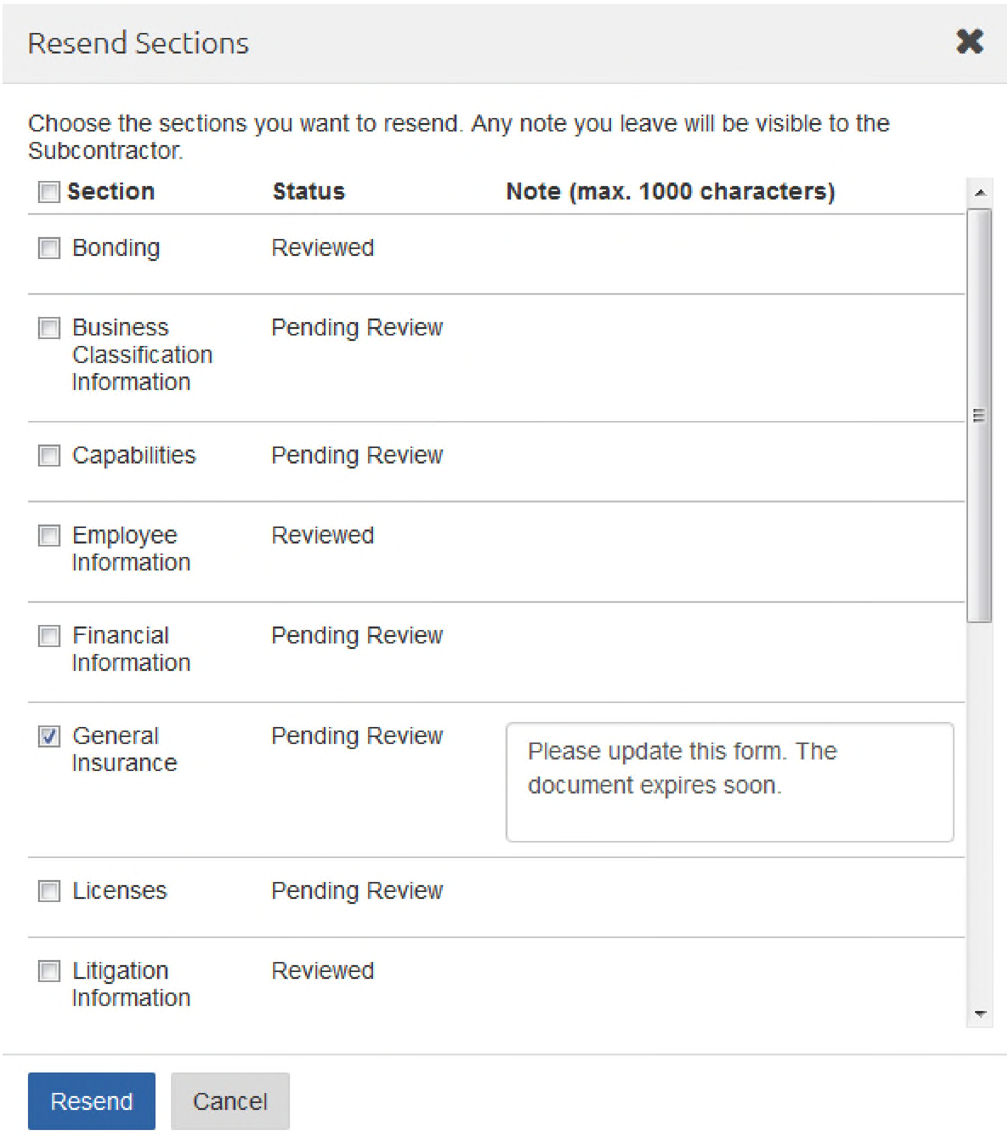
How do I resend multiple categories?

Use one tool to manage all sections.

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

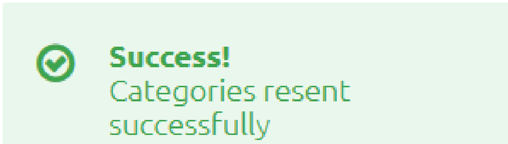


2) In the **Resend** dialog box, select each section to resend.



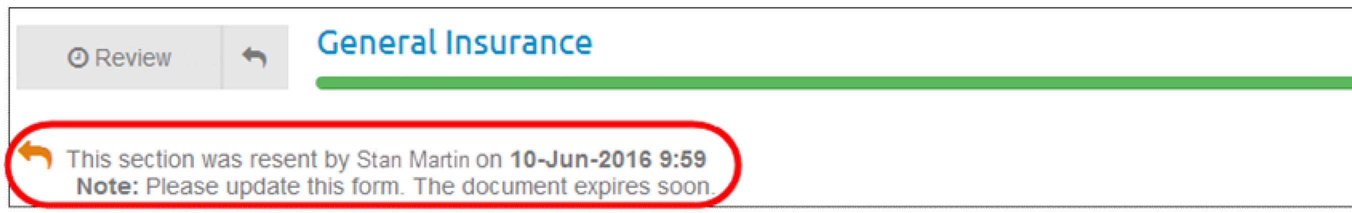
3) (Optional) Include a note.
Enter text in the **Note** field. Submitting organizations will see the note next to a resend (orange arrow icon) in the category's heading.
4) Select **Resend**.

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



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

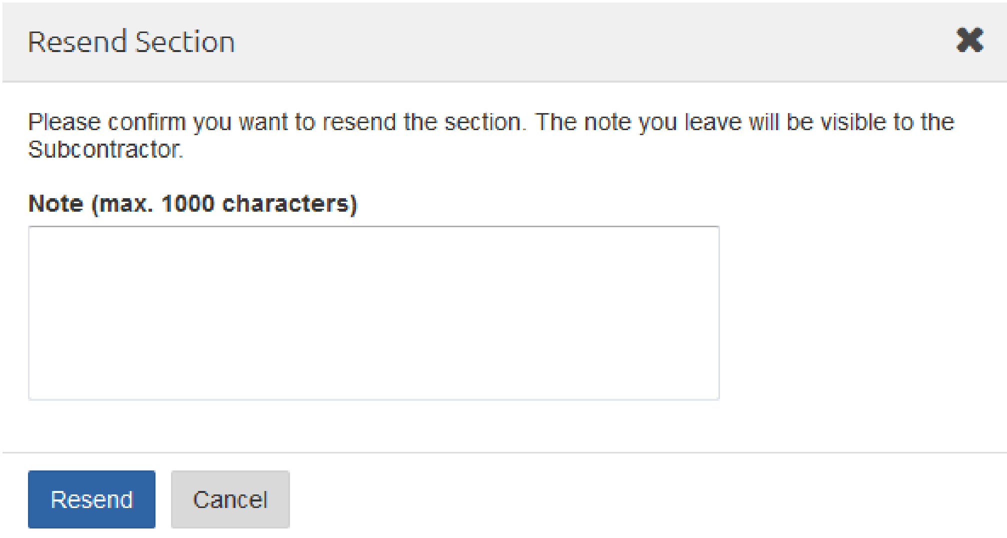
- The resend (orange arrow icon) appears in the category heading. It is available in both your workspace as well as the submitting organization's task list.



How do I resend a single category?

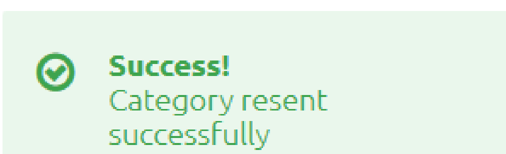
Each category heading includes a resend (blue arrow) button.

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

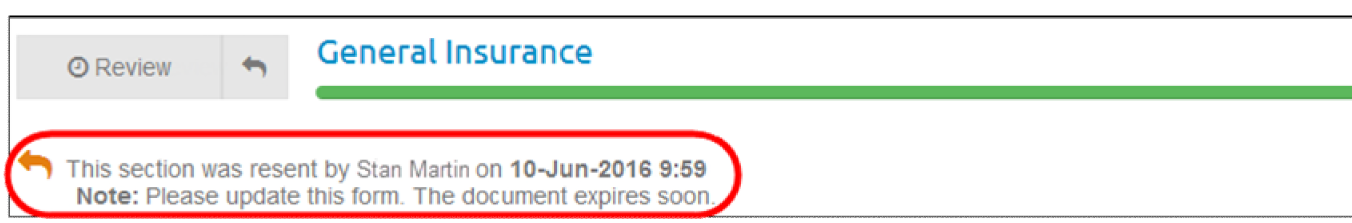


> **Note:** *The blue resend button turns white if you already reviewed the category.*

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.



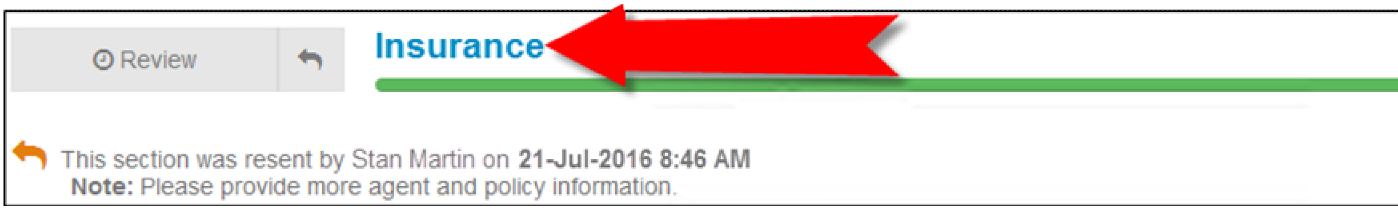
   - The **Review** button changes to **Review**.
   - The resend (orange arrow icon) appears in the category heading. It is available in both your workspace as well as the submitting organization's task list.



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

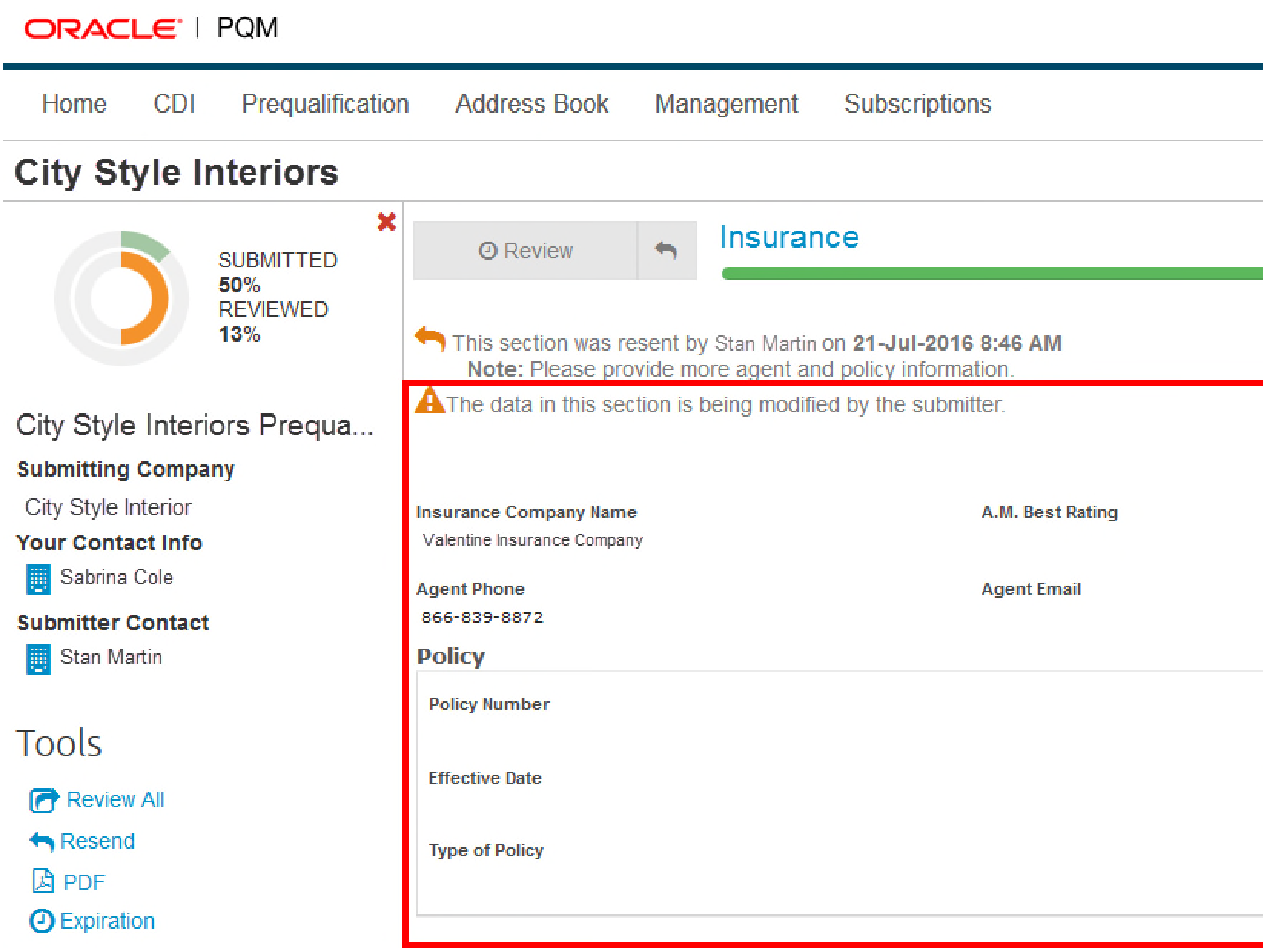
Yes, the system saves a resent category's most recently submitted data to the workspace.

1) Select a category.



The category expands.

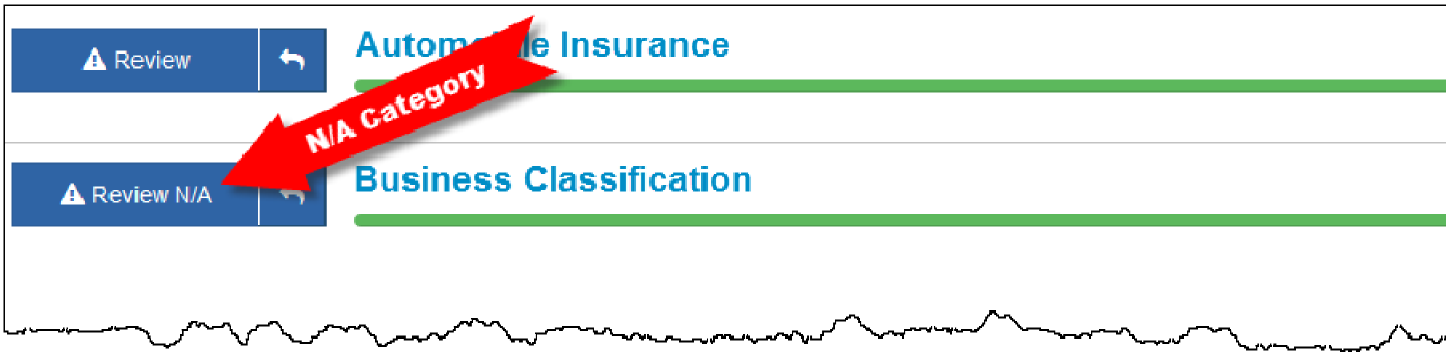
2) View resent data.



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

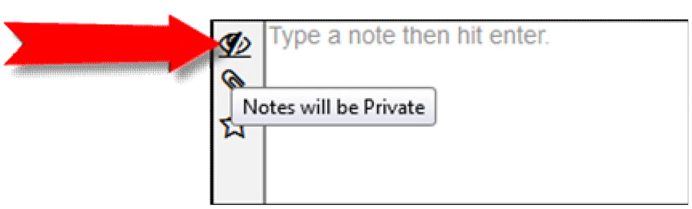
Will the workspace tell me if a category is not applicable?

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.



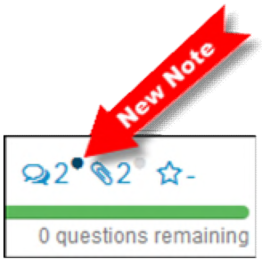
How do I write a private note?

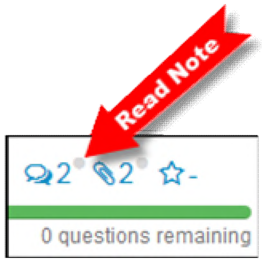
When entering a note, select the (eye icon) to toggle between (public) and (private) options. Public notes display in the submitting organization's workspace. Only other members within your organization can see private notes.



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

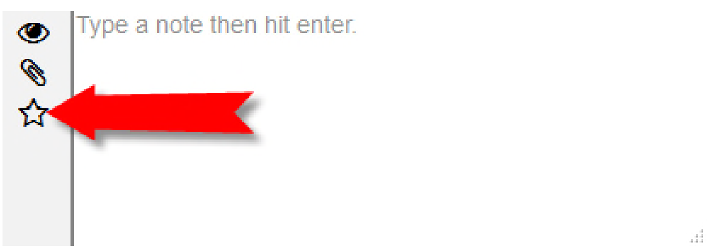
Yes. The system alerts users to new notes and attachments through its category tools. When a user uploads a new attachment or writes a new note, the (gray circle icon) next to the number of notes or attachments turns blue. Once notes or attachments are opened, the (blue circle icon) turns back to gray.



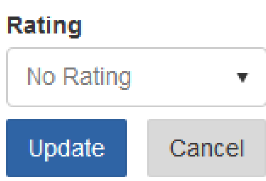


How do I rate a category without reviewing it?

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



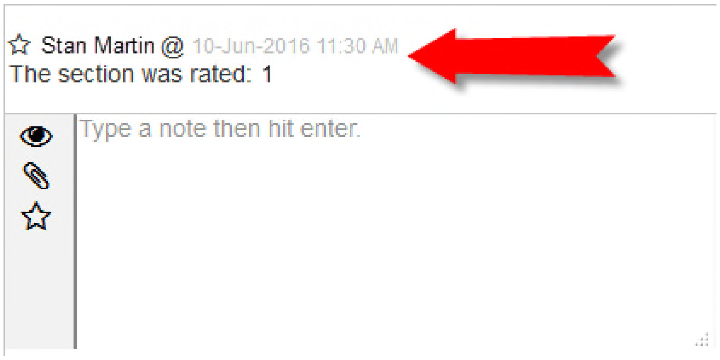
A **Rating** dialog box opens.



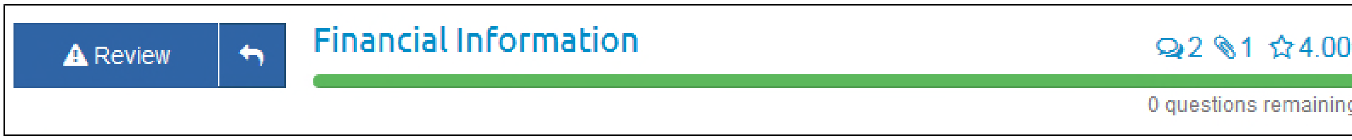
3) Use the drop-down to choose a rating on a scale of **1** (the lowest rating) to **5** (the highest rating).
4) Select **Update**.

- 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.

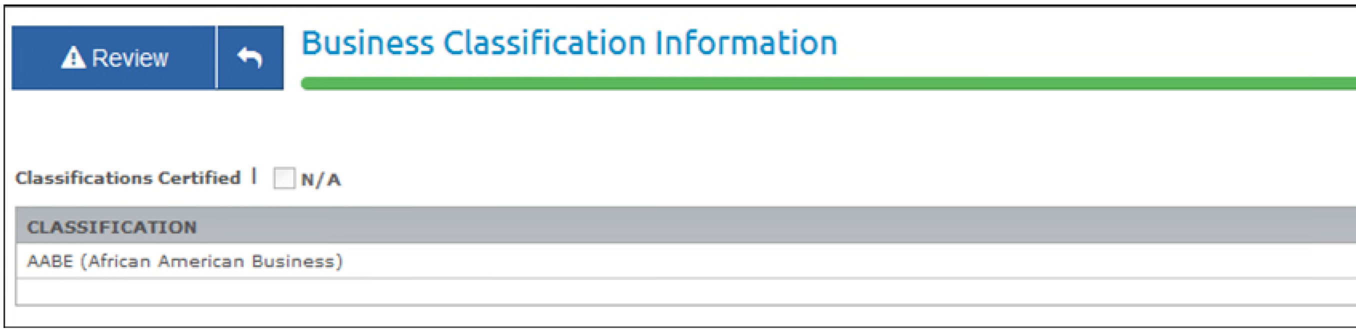
The overridden values display on the page.

How do I view attachments?

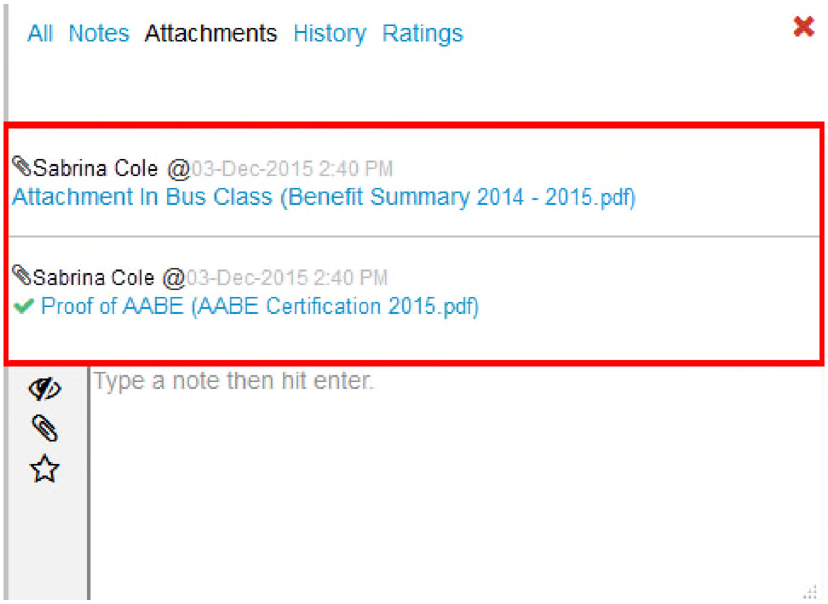
Each section includes attachment information at the top of the category heading.

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

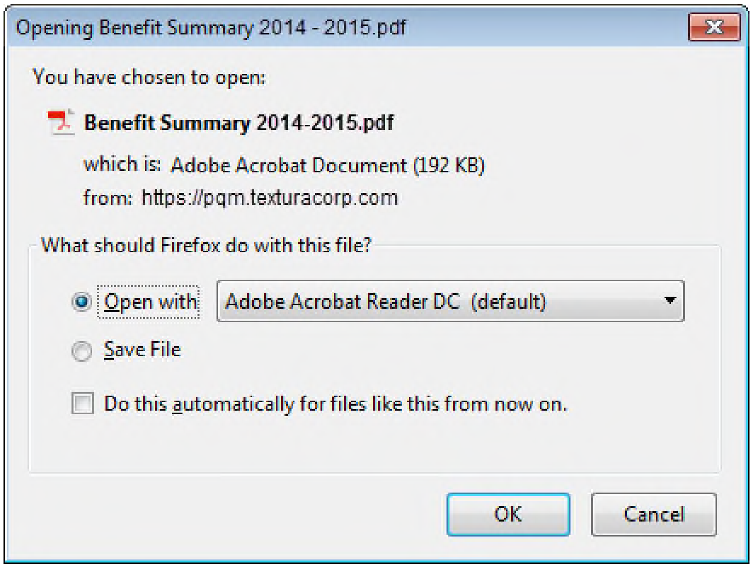
I. Select the (paperclip icon) in a category heading.



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

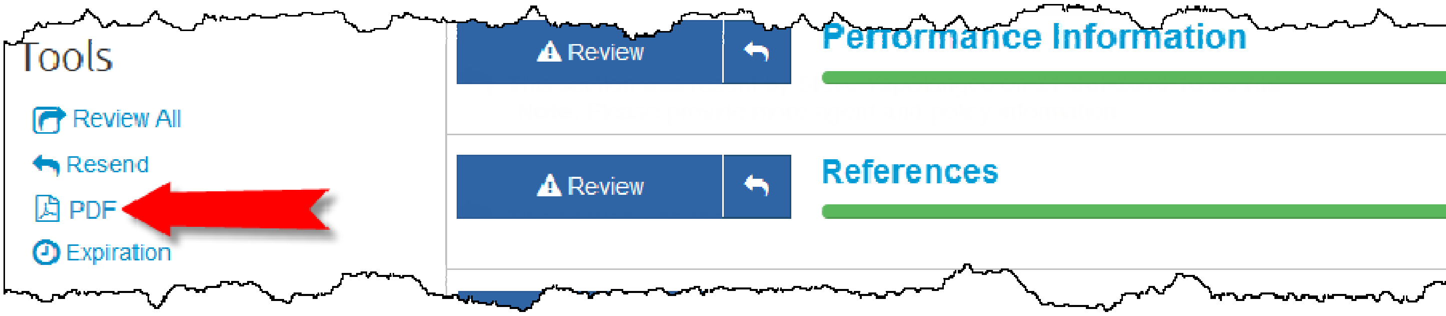
- Vendor
- Status
- Activity
- Completed
- Request
- Workflow
- RMP

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

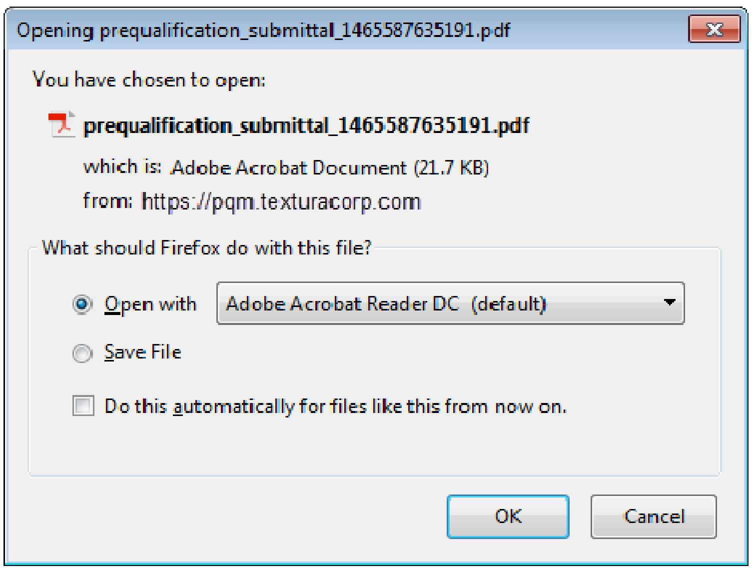
Can I print all categories at one time?

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.*

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