

Oracle
Textura
PQM Submitter FAQs

Version 22
November 2022

Contents

About This Guide.....	5
PQM Overview.....	7
What is included in the Workspace?.....	7
How do I view task listings?	9
How do I navigate between tasks?.....	10
What are my search options when looking for a contact in my address book?	10
Completing Tasks	11
Where can I find notes?	11
Where are the task directions?	12
Do I need to answer every question?	12
How do I upload an attachment?	13
How do I save a form to my library?	16
How do I fill in a form from my library?	19
Can I use the information from a form I submitted in the past?	20
Can I see values I entered in previous years when filling out the financial category?	22
How do I add information to a table?.....	23
How do I delete or edit a line from a table?.....	24
How do I sign the qualification document?	24
I forgot my PIN. How do I reset it?	25
How do I submit a task to the General Contractor?	27
Can I submit more than one task at a time?	27
Alerts.....	31
What is a validation error?	31
Why can't I submit a task?	33
Why was I logged out?.....	33
Copyright.....	34

About This Guide

This guide addresses questions frequently asked by prequalification submitters when using the Oracle Pre-Qualification Management (PQM) solution to submit prequalification forms. Typically, Subcontractors or Suppliers using PQM to prequalify for a project should use this guide.

PQM Overview


In This Section

What is included in the Workspace?	7
How do I view task listings?	9
How do I navigate between tasks?	10
What are my search options when looking for a contact in my address book?	10

What is included in the Workspace?

The default view of the workspace shows three panels:

- ▶ **Left Panel**—Includes a summary of submitted and reviewed tasks; organization details, like your company name, your contact information, and the Requestor's contact information; and a tools section
- ▶ **Center Panel**—Shows active, completed, and submitted tasks
- ▶ **Right Panel**—Displays **Notes**, **Attachments**, and **History**.

If the screen does not display the left panel, choose the  (blue plus icon) to reveal it.

The image shows a web browser window displaying the Oracle PQM Insurance submission form. A red box highlights a sidebar menu on the left, with two red arrows pointing from it to a plus sign icon on the form header. The sidebar menu includes a progress indicator, a list of sections, and a 'Tools' section with several actions.

Progress Indicator:

- SUBMITTED 25%
- REVIEWED 0%

Prequalification Packet

- Your Company Name**
City Style Interiors
- Your Contact Info**
Sabrina Cole
- Requestor Contact**
Stan Martin

Tools

- Submit All
- Load from Library
- Save to Library
- PDF

Main Form Header:

- Forms - Mozilla Firefox
- https://pqm.texturacorp.com/app#/login/webapp/
- ORACLE | PQM
- Home Prequalification Address Book Management Subscrip
- Universal Construction
- Submit Insurance

Form Content:

- Warning: This section needs to be submitted. [Submit now.](#)
- Save
- Insurance Company Name** (text input)
- A.M. Best Rating** (dropdown menu)
- Agent Phone** (text input with mask: ####-####-####)
- Agent Email** (text input)
- Policy**
- Policy Number** (text input)
- Effective Date** (calendar icon, format: DD-MMM-YYYY)
- Type of Policy** (text input)
- Expiration Date** (text input, format: DD-MMM-YYYY)
- Amount** (text input, value: 1,234.00)

Note: Notes also display in the task listing if the Reviewer re-sent a form.

Financial Information 0 questions remaining

This section was resent by Stan Martin on 07-Jul-2015 3:02 PM

Note: Good afternoon, Thank you for the financial information uploaded to PQM. Can you please upload your most recent year-end Balance Sheet and Profit & Loss Statement so that I can complete my financial review in PQM? Thank you, Stan Martin - Corporate Controller Global Construction

This section needs to be submitted. [Submit now.](#)

Save

Stan Martin
07-Jul-2015
Note: Good afternoon, Thank you for the financial information uploaded to PQM. Can you please upload your most recent year-end Balance Sheet and Profit & Loss Statement so that I can complete my financial review in PQM? Thank you, Stan Martin - Corporate Controller Global Construction

How do I view task listings?

Bonding Information 3 questions remaining



This section needs to be submitted. [Submit now.](#)

Save


Each collapsed task includes the following information:

- 1) **Status** – A task's submission status
 - ▶ **Submit** (gray) – The task is incomplete or cannot be submitted.
 - ▶ **Submit** (blue) – The task is complete and ready for submission.
 - ▶ **Submitted** – The task was successfully sent to the General Contractor.

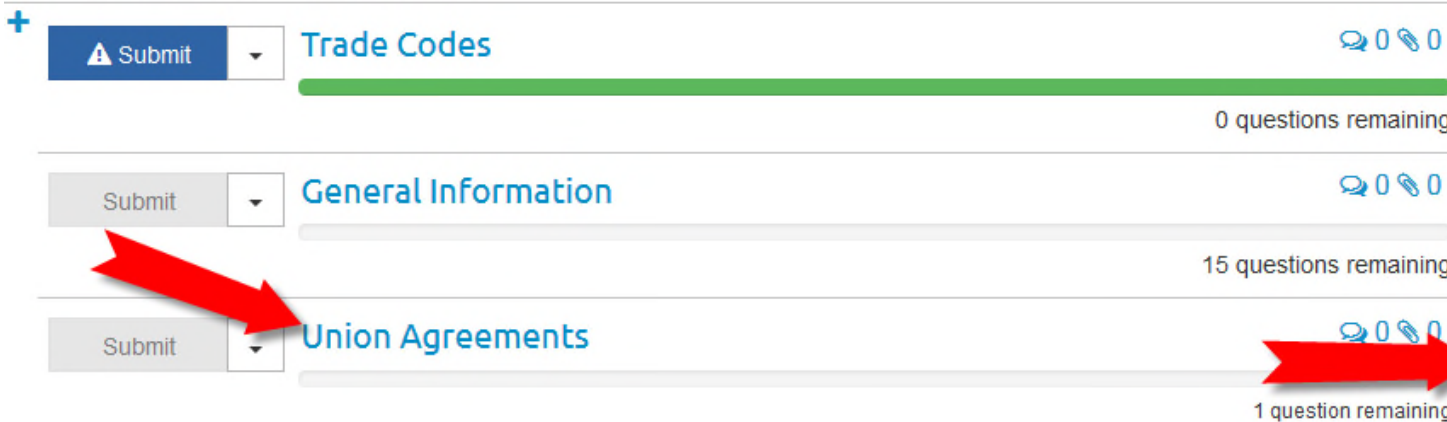
Note: Submitted tasks display with a (green check mark icon).
- 2) **Status Bar** – A visual representation of the task's completion percentage
- 3) **Name** – The name or description of a task
- 4) **Questions Remaining** – Counts how many more questions must be completed in order to submit the task

- 5)  (Comments) – The number of comments
- 6)  (Attachments) – The number of attachments

How do I navigate between tasks?

All tasks display in a single workspace. Select the  (drop-down icon) or the task name to view details. The expanded task shifts to the top of the screen.

Universal Construction



The screenshot shows a workspace with three tasks. The first task, "Trade Codes", has a blue bar and a "Submit" button with a warning icon. The second task, "General Information", has a grey bar and a "Submit" button. The third task, "Union Agreements", has a grey bar and a "Submit" button. A red arrow points to the drop-down menu of the "Union Agreements" task. Another red arrow points to the right side of the "Union Agreements" task bar. The number of questions remaining for each task is displayed on the right: 0 for Trade Codes, 15 for General Information, and 1 for Union Agreements.

Note: Choosing a different task saves any progress on the original task, expands the new task, and shifts the new task to the top of the screen.

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.


Completing Tasks

In This Section


Where can I find notes?	11
Where are the task directions?	12
Do I need to answer every question?	12
How do I upload an attachment?	13
How do I save a form to my library?	16
How do I fill in a form from my library?	19
Can I use the information from a form I submitted in the past?	20
Can I see values I entered in previous years when filling out the financial category?	22
How do I add information to a table?	23
How do I delete or edit a line from a table?	24
How do I sign the qualification document?	24
I forgot my PIN. How do I reset it?	25
How do I submit a task to the General Contractor?	27
Can I submit more than one task at a time?	27

Where can I find notes?


The workspace includes a notes section. Select **All**, **Attachments**, or **History** to change the view.

Note: *If the Reviewer re-sent a task, the task notes appear with a  (yellow arrow icon) beneath the progress bar.*

Where are the task directions?

When included, directions and information display next to an  (information icon) near the top of the page.

 Please attach your most recent two years of audited financial statements.

 This section requires an attachment. [Attach the document now.](#)

Save

▼ Financial Statements

Number of Financial Periods to Collect: 2


Type: Annual

Note: *Not all tasks have directions.*

Do I need to answer every question?

Only questions with red asterisks (*) are required. However, consider answering every question if you plan to save the form to your library.

How do I upload an attachment?


- 1) Select the  (paper clip icon) to expand the attachments section in the right panel.

Universal Construction 1. Welcome 2. Comp

+ 0 questions remaining

Submit **Insurance** 0 0

0 questions remaining

 This section needs to be submitted. [Submit now.](#)

Save

Insurance Company Name **A.M. Best Rating** **Agent Name**


Agent Phone **Agent Email**

Policy

Policy Number

Effective Date **Expiration Date**

Each Accident **Disease - Each Employee**




Attachment-related fields display.

- 2) In the **Description** field, enter a description for the document.

Universal Construction



 Submit



Insurance

 0  0



0 questions remaining



This section needs to be submitted. [Submit now.](#)

Save

Insurance Company Name

A.M. Best Rating

Agent Name

Agent Phone

Agent Email

Policy

Policy Number

Effective Date

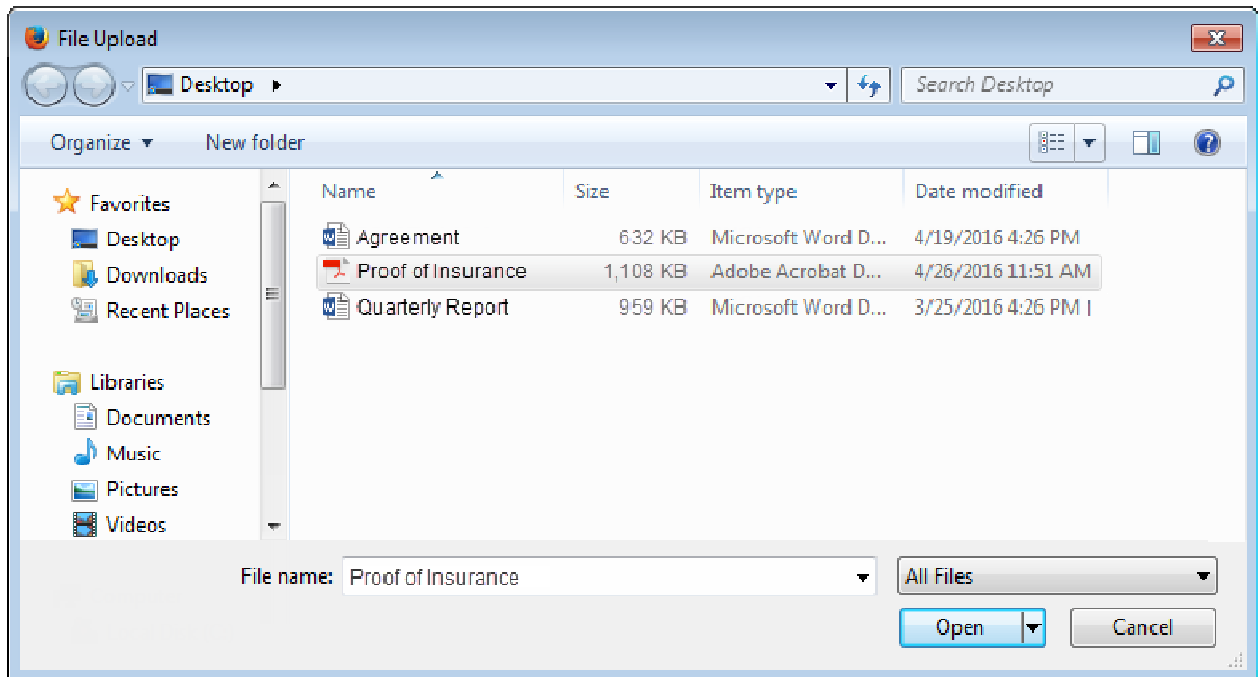
 

Expiration Date

Each Accident

Disease - Each Employee

3) Select **Select File**.

A **File Upload** dialog box appears.

- 4) Choose the file and select **Open**.
The file's name displays next to the **Select File** button.

Note: If you upload a PDF file, you can enter your PIN to electronically sign it.

- 5) Select **Attach**.
A **File Uploaded Successfully** message confirms the document has been uploaded.

How do I save a form to my library?

- 1) Select the **Save to Library** tool.

Universal Construction



SUBMITTED
0%
REVIEWED
0%

PreQualification Request M...

Your Company Name

City Style Interiors

Your Contact Info

Sabrina Cole

Requestor Contact

Stan Martin

Tools

Submit All

Load from Library

Save to Library

PDF

Submit

Company Information

This section needs to be submitted. [Submit now.](#)

Save

Business Information

Business Type

Corporation

Website

CityStyleInteriors.com

Company Type

General Contractor
Other
Owner
Subcontractor
Supplier

In what country was the company founded?

United States

UCC Filing

A12345

Parent Organization

Not Applicable

Years of Doing Business Under Current Name

5

Federal Employer ID (FEIN)

12-34567890

Change in Ownership (last 5 years)

☐ Yes ☒ No

Equal Opportunity Employer

☐ Yes ☒ No

A **Save Section to Library** dialog box appears.

Save Section to Library
✕

Choose the section you want to save to your library

Safety Information-NOT_SUBMITTED - 0 Questions Remaining ▼

☐ Create new library section named

☒ Save to an existing library named

Safety Information -... ▼

Options

☐ Set this library section to be the default when loading

☒ Set this library section to remind you to update

Recurrence

Monthly ▼

Starting

30-Apr-2016

Save

Cancel

- 2) Use the **Choose the section you want to save to your library** drop-down list to choose a section to add to the library.
- 3) Choose a save destination:
 - ▶ **Create new library section named**—Enter a name for the new section
 - ▶ **Save to an existing library named**—Use the drop-down list to select an existing library.
- 4) (Optional) **Set this library section to be the default when loading** check box—Select this setting to automatically load a section in the **Load Sections from Library** drop-down list.
- 5) (Optional) **Set this library section to remind you to update** check box—Select this setting to receive email reminders when a library item must be updated:
 - ▶ **Recurrence**—Use the drop-down list to choose how often the library sends reminders
 - ▶ **Starting**—Select the date the library will first send a reminder.
- 6) Select **Save**.
The dialog box closes and the form is saved to the library.

How do I fill in a form from my library?

- 1) Select the **Load from Library** tool.

Universal Construction

LL Subguard Qualifcation - ...

Your Company Name
City Style Interiors

Your Contact Info
 Sabrina Cole

Requestor Contact
 Stan Martin

Tools

- Submit All
- Load from Library
- Save to Library
- PDF

Submit

Financial Information

Save

Financial Statements

Number of Financial Periods to Collect: 3

Type: Annual

Financial Statements are:

How often are they prepared?

	<input type="checkbox"/> N/A
	Period Ending * DD-MMM-YYYY
Cash & Cash Equivalents	<input type="text"/> 1,234
Accounts Receivable (Net of Retention)	<input type="text"/> 1,234
Trades Receivable	<input type="text"/> 1,234
Total Current Assets	<input type="text"/> 1,234
Total Assets	<input type="text"/> 1,234

A **Load Sections from Library** dialog box appears.

- 2) Use the drop-down list to choose a library section.

Load Sections from Library

Please choose which section you want to load from your Library.

⚠ Loading a library overwrites any data in the current form.

Sections	Choose Library Section
Automotive Liability Insurance	Automobile Insurance
Banking Information	Banking Information
Bonding Information	Bonding
Contractor's Pollution Insurance	No Library Section Selected
Employee History	No Library Section Selected
Excess Liability Insurance	No Library Section Selected
Financial Information	No Library Section Selected
General Liability Insurance	No Library Section Selected
Geographic Areas	No Library Section Selected

Load

Cancel

- 3) Select the **Load** button.
The dialog box closes and data automatically loads into the task.

Can I use the information from a form I submitted in the past?

Yes, the system automatically saves a form's last submitted data for future use.

- I. Select a prequalification packet.

Welcome

For your convenience, we can fill the form with your previously submitted data. Based on your permissions [15 sections](#) will be filled.

Please be sure to review each section before submission.

Ok

No thanks

Advanced

The workspace opens and a dialog box displays.

Note: This dialog box only displays for the first user who logs in after submitting a form, and the forms available are dependent upon your user permissions.

2. (Optional) Position the cursor over the **# sections** text to display the names of each previously submitted section.

Welcome

For your convenience, we can fill the form with your previously submitted data. Based on your permissions [15 sections](#) will be filled.

Please be sure to review each

Ok

No thanks

Category Name	Last Updated
Automobile Insurance	23-Jun-2016
Business Classification	22-Jun-2016
Company Information	23-Jun-2016
General Liability Insurance	23-Jun-2016
Litigation Information	22-Jun-2016
Pollution Insurance	16-Jun-2016
Professional Liability Insurance	16-Jun-2016
Project History	22-Jun-2016
Quality Assurance	25-Jun-2015
References	22-Jun-2016
Safety Information	22-Jun-2016
Subcontractor Trades	22-Jun-2016
Surety Information	22-Jun-2016
Umbrella Insurance	16-Jun-2016
Workers' Compensation Insurance	16-Jun-2016

3. Select **Ok**.

All available previously submitted data automatically completes open forms.

Universal Construction

SUBMITTED 0%
REVIEWED 0%

City Style Interiors Pre-Qualifica...

Your Company Name
City Style Interiors

Your Contact Info
Sabrina Cole

Requestor Contact
Stan Martin

Tools
Submit All
Load from Library
Save to Library
PDF

Business Classification

Quality Assurance

Safety Information

Pollution Insurance

Automobile Insurance

Workers' Compensation Insurance

Project History

Note: If a category has more questions than a previously submitted form, the category will be incomplete. Open the category to answer the remaining questions.

Can I see values I entered in previous years when filling out the financial category?

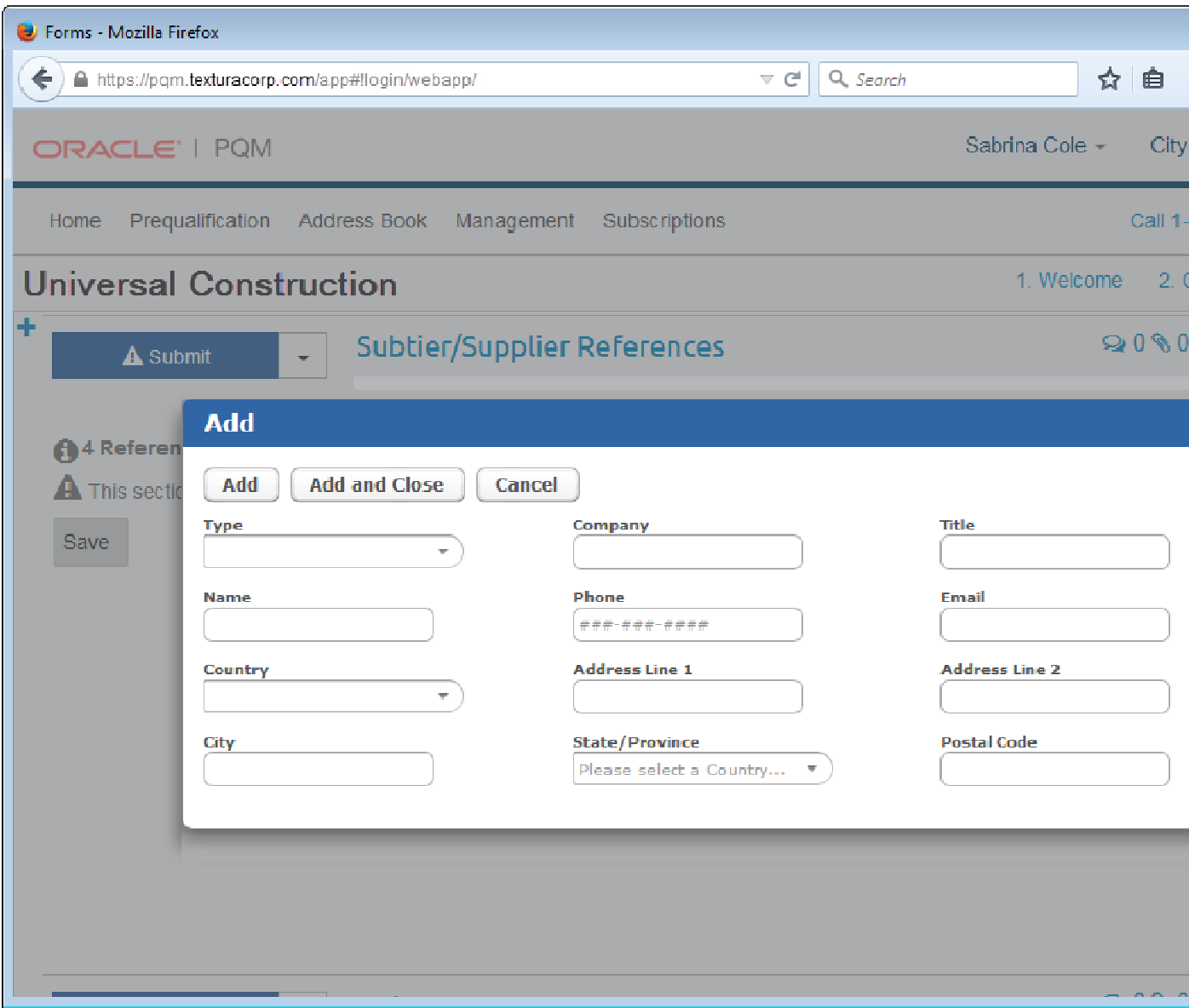
If you completed the **Financial** category in a form last year and you must complete that form again this year, you will automatically see the information you previously entered when you look at the financial category for this year.

These values will only automatically populate the fields in the **Financial** category if the category's name did not change and you submitted financial information last year.

How do I add information to a table?

A table displays for contact information, safety ratings, bonding information, and several other task types.

- 1) Select the + (green plus icon).



An **Add** dialog box displays.

- 2) Enter details in the **Add** dialog box.

Note: The details required depend upon the task type.

- 3) Select the **Add and Close** button.
The dialog box closes and data displays in the table.

ID	NAME	EMAIL	COMPANY	ADDRESS LINE 1	ADDRESS LINE 2	CITY	STATE/ZIP/COUNTRY	PHONE/EXT
Supplier - Owner	(33) 424-7349	housh@housh.com		100 East Main Street		Norman	OKLAHOMA 73061	40551

How do I delete or edit a line from a table?

- ▶ Select the (red X icon) to delete a line.
- ▶ Select the (pencil icon) to edit a line.
 1. An **Edit** dialog box opens.
 2. Edit information and select **Update**.

Edit

Update

Cancel

Year *

2012

Total Employees *

510

How do I sign the qualification document?

Once you complete all information tasks included in a form, the final step is to sign the qualification document. Open the **Sign Qualification** task. Enter your PIN and select **Sign**.

Submit Sign Qualification

1 question remaining

i Generate and Sign printable format of requested requirements

1. Review the qualification document.
2. Sign the qualification document.

Enter your PIN *

Sign

[Forgot PIN?](#)

3. Submit the qualification document.

The screen refreshes, the gray **Submit** button changes to blue, and check marks display to confirm the task has been signed. An alert prompts you to submit the section.

Universal Construction

+ **Submit** Sign Qualification

0 questions remaining

i Generate and Sign printable format of requested requirements

! This section needs to be submitted. [Submit now.](#)

- ✓ 1. Review the qualification document.
- ✓ 2. Sign the qualification document.

Electronically signed by Sabrina Cole on 28-Apr-2016 11:31:11 CDT

3. Submit the qualification document.

Category Status

References Reviewed

I forgot my PIN. How do I reset it?

A PIN is required to sign a qualification on the system. To reset the PIN select the **Forgot PIN** link under the **Sign Qualification** task. A **Change PIN** dialog box will appear.

The screenshot shows a web interface for 'Sign Qualification'. At the top, there is a 'Submit' button, a progress bar labeled '<1h', and a notification '1 question remaining'. Below this, a list of steps is shown: '1. Review the qualification document.', '2. Sign the qualification document.', and '3. Submit the qualification document.'. Under step 2, there is a field 'Enter your PIN *' with a 'Sign' button and a link 'Forgot PIN?'. A red arrow points from the 'Forgot PIN?' link to the 'Change PIN' modal. The modal has a title bar 'Change PIN' with a close button. Inside, it explains that PINs are used for electronic signatures and lists requirements: 'Your PIN: - must be between 4-6 digits (ex. 12345) without any digit repeated 3 times. - must be something memorable that cannot be easily guessed.' Below this, there are three input fields: 'Current Password *', 'New PIN *', and 'Confirm New PIN *'. At the bottom of the modal are 'Apply' and 'Cancel' buttons.

Submit

Sign Qualification

<1h

1 question remaining

Generate and Sign printable format of requested requirements

1. Review the qualification document.
2. Sign the qualification document.
Enter your PIN *
 Sign
[Forgot PIN?](#)
3. Submit the qualification document.

Change PIN

PINs are used to apply electronic signatures to your documents.

Your PIN:

- must be between 4-6 digits (ex. 12345) without any digit repeated 3 times.
- must be something memorable that cannot be easily guessed.

Current Password *

New PIN *

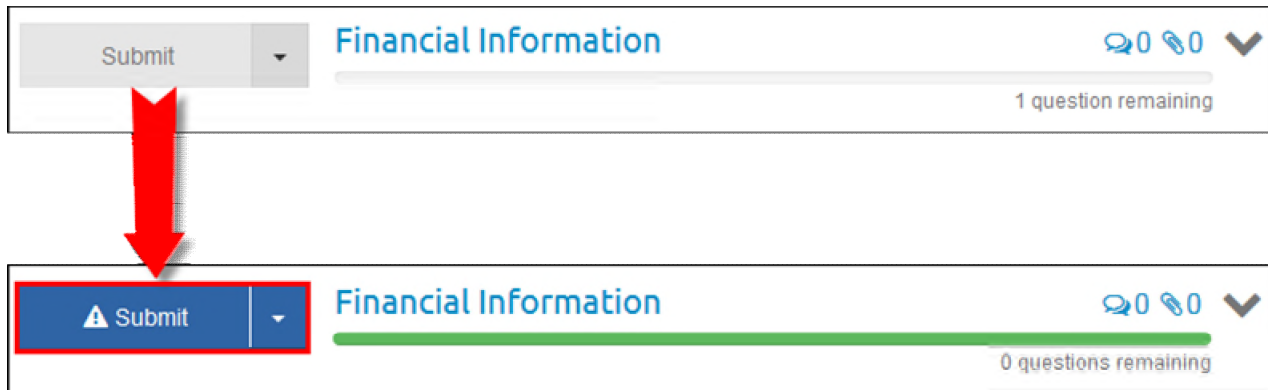
Confirm New PIN *

Apply Cancel

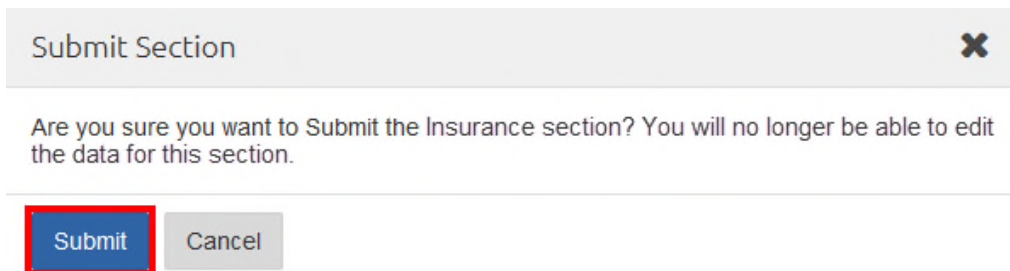
- 1) Enter your current password.
- 2) Enter a new PIN that meets the requirements:
 - ▶ Must be between 4-6 digits without any digit repeated three times
 - ▶ Must be something memorable that cannot be easily guessed.
- 3) Re-enter the PIN in the **Confirm New PIN** field and select **Apply**.

How do I submit a task to the General Contractor?

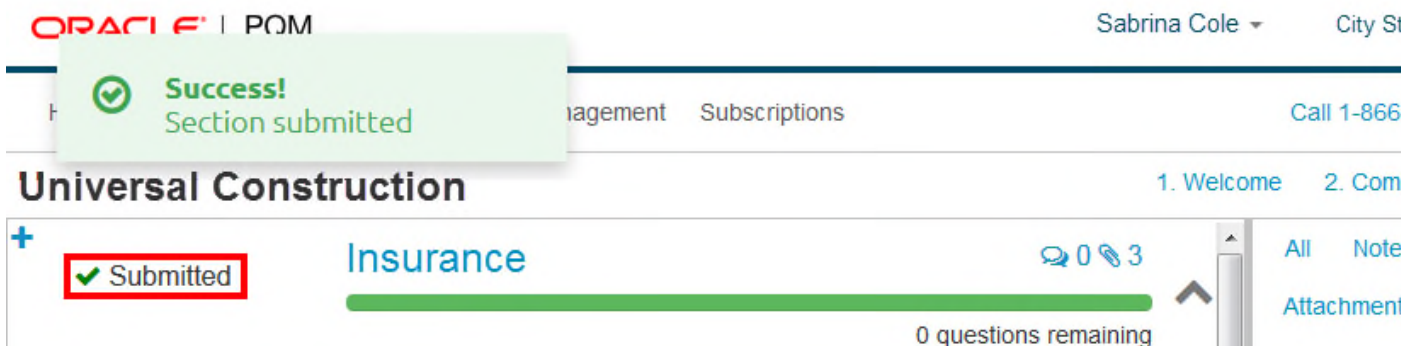
When a task is ready for submission, the gray **Submit** button turns blue.



- 1) Select **Submit**.
A **Submit Selection** dialog box appears.
- 2) Select **Submit** in the dialog box.



A **Success! Section Submitted** message appears and the blue **Submit** button changes to **Submitted**.




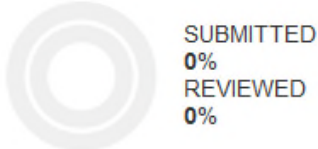
Can I submit more than one task at a time?

Yes, you can submit all completed tasks at once.

- 1) Select the **Submit All** tool to submit all complete tasks to the Reviewer.


Universal Construction











UNIVERSAL CONSTRUCTION - SU...


Your Company Name
City Style Interiors

Your Contact Info
 Sabrina Cole


Requestor Contact
 Stan Martin

Tools

-  **Submit All** 
-  Load from Library
-  Save to Library
-  PDF

 Submit

Minority Business Information

 Submit

Scope Information

Submit

Company Information

Submit

Employees

Submit

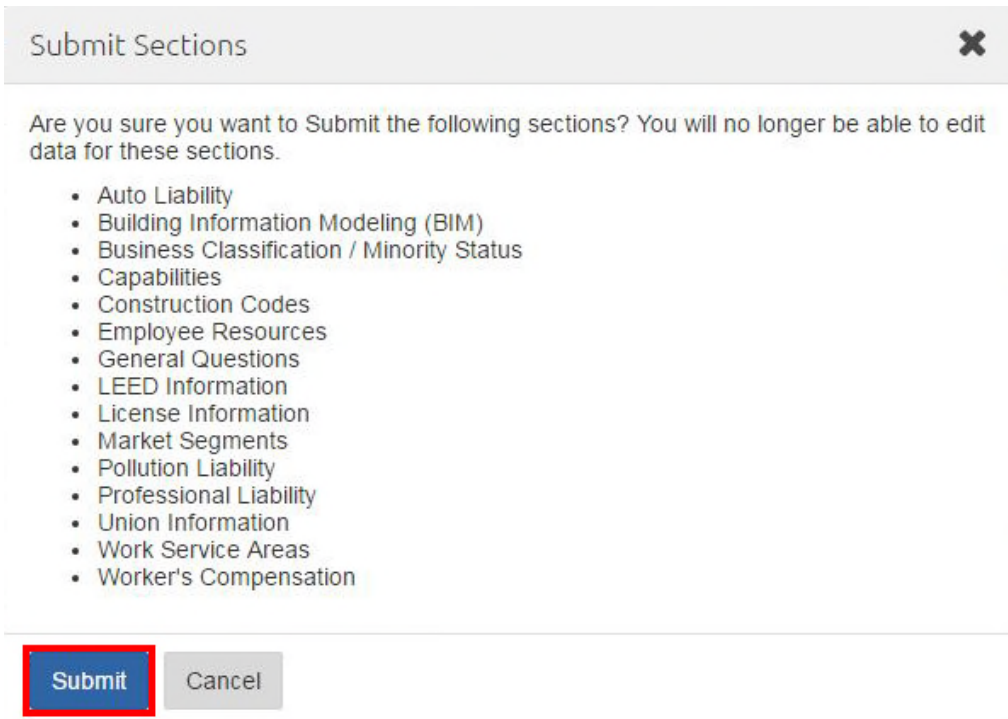
Performance Information

Submit

Legal

A **Submit Sections** dialog box appears. It lists sections ready for submittal.

2) Select **Submit** in the dialog box.

A dialog box titled "Submit Sections" with a close button (X) in the top right corner. The main text asks: "Are you sure you want to Submit the following sections? You will no longer be able to edit data for these sections." Below this is a list of sections: Auto Liability, Building Information Modeling (BIM), Business Classification / Minority Status, Capabilities, Construction Codes, Employee Resources, General Questions, LEED Information, License Information, Market Segments, Pollution Liability, Professional Liability, Union Information, Work Service Areas, and Worker's Compensation. At the bottom are two buttons: "Submit" (highlighted with a red border) and "Cancel".

Submit Sections

Are you sure you want to Submit the following sections? You will no longer be able to edit data for these sections.

- Auto Liability
- Building Information Modeling (BIM)
- Business Classification / Minority Status
- Capabilities
- Construction Codes
- Employee Resources
- General Questions
- LEED Information
- License Information
- Market Segments
- Pollution Liability
- Professional Liability
- Union Information
- Work Service Areas
- Worker's Compensation

Submit Cancel

Note: *Tasks with incomplete required questions cannot be submitted.*

Alerts

In This Section

What is a validation error?	31
Why can't I submit a task?	33
Why was I logged out?	33

What is a validation error?

Validation Errors appear when you attempt to save data that is entered in an incorrect format.

Forms - Mozilla Firefox

https://pqm.texturacorp.com/app#/login/webapp/

Sabrina Cole ▾ City Style

Validation Issues!
There are some validation issues on the section you tried to save.
Please correct these highlighted issues.

Call 1-866-

1. Welcome 2. Comp

Universal Construction

Submit ▾

Financial Information

1 quest

SUBMITTED 8%
REVIEWED 0%

Save

LL Subguard Qualifcation - ...

Your Company Name
City Style Interiors

Your Contact Info
Sabrina Cole

Requestor Contact
Stan Martin

Tools
Submit All
Load from Library

Invalid date for Period Ending. The date entered does not exist and/or must be formatted as DD-MMM-YYYY

Period Ending Required

Financial Statements

Number of Financial Periods to Collect: 3

Type: Annual

Financial Statements are: ▾

How often are they prepared? ▾

	<input type="checkbox"/> N/A	Period Ending *	Peri
		01-30-2016	DD
Cash & Cash Equivalents		1,234	
Accounts Receivable (Net of Retention)		1,234	
Trades Receivable		1,234	
Total Current Assets		1,234	
Total Assets		1,234	

- ▶ A **Validation Issues!** message appears at the top of the page.
- ▶ Instructions for the error display at the top of the task.
- ▶ The erroneous task is highlighted.

For Example: This task requires users to input dates in the DD-MMM-YYYY format. The MM-DD-YYYY style is not an acceptable format so it creates a validation error.

Why can't I submit a task?

You cannot submit a task until all questions marked with a red asterisk (*) are completed. The system displays an orange alert when you save a form before completing all required tasks.



We have saved your form, but you have missed some fields. You must enter data before you can Submit.

Instructions at the top of the task also list the missing requirements.



The table "Employee History" requires at least one entry



Employee History * | ☐ N/A

Why was I logged out?

The system times out when you are inactive for 30 minutes. A red message appears when you attempt to navigate away from a task, enter data, or save.

Session Timed Out

Your session has timed out for security reasons. You will be redirected to the Login page.

Copyright

Oracle Textura PQM Submitter 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.