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Textura Payment Management v22.12 Release Notes

Release date: December 04, 2022

What's New in This Release?

The Textura v22.12 release includes improvements to the user interface, new functionality, and numerous bug fixes.

Below is a summary of the overall changes:

- A new Document Templating tool called **DocWriter** is now available to Owner and General Contractor organizations. Preview your organization's document templates with data from any of your existing in-flight projects.

- A new page called **Project Metering Data** is now available to Owner and General Contractor organizations. This page displays project fee invoice details to help customers understand what projects are included on their Oracle Textura invoice.

- The **Subcontract List** page has been updated to include functionality from the Manage Subcontractor Settings page which is now retired. Users can configure the page to show default retention rate, open book settings, and payment method columns. A guided tour will be presented to all users when visiting the Subcontract List page.

- The **Contract Settings** page has been refreshed to further simplify your experience and to unify the user interface across Textura. When editing a contract, Contract Settings now opens in a Drawer from the right.

- The **Project Settings Report** now includes a Project Creation Date filter to generate the report against a specified project creation date range.

- Subcontractors operating on projects in the UK can now **request change orders.** Head Contractors have the ability to approve or reject the newly requested change orders as well as allocate to existing or new components.

- For project's located in the UK, a new project setting named "**Calculate VAT before Retention is held**" is now available to enable all contracts to calculate VAT before retention is held.

- Google Chrome Support Ending for Windows 7 & 8.1. Learn More.

- Numerous bugs have been fixed in this release.

To learn more about this release and future releases, we encourage you to attend our monthly Level Up webinar. You can register here.

To see more information about each of the individual changes included in this release, please go to the next page.

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Key Enhancements Implemented

Product Area	Feature	Details	Personas Impacted
DocWriter	DocWriter – new document template tool	A new Document Templating tool called **DocWriter** is now available to Owner and General Contractor organizations. Preview your organization's document templates with data from any of your existing in-flight projects. All standard and proprietary documents available to your organization can be previewed and samples can be downloaded in .pdf format. Enterprise Administrators can grant access to user's of their organization by enabling the <u>View Only DocWriter</u> permission on a user's profile. Additional functionality including editing and publishing documents is scheduled to be made available in future releases.	☒Owner ☒GC ☐Subcontractor ☐Sub-tier ☐Vendor
Oracle Textura Invoices	Project Metering Data – Oracle Textura Invoices	A new page called **Project Metering Data** is now available to Owner and General Contractor organizations. Enterprise and Local Admins can access this page through the Project Fees link in the organization drop down. This page displays project fee invoice information in detail to help customers understand what projects are included on their Oracle Textura invoice.	☒Owner ☒GC ☐Subcontractor ☐Sub-tier ☐Vendor
Subcontract List	Subcontract List – update page and retire Manage Subcontractor Settings page	The **Subcontract List** page has been updated to include functionality from the **Manage Subcontractor Settings** page which is now retired. Users can configure the page to show default retention rate, open book settings, and payment method columns. A guided tour will be presented to all users when visiting the Subcontract List page.	☐Owner ☒GC ☒Subcontractor ☐Sub-tier ☐Vendor
Contract Settings	Contract Settings - modernize and move to drawer	The **Contract Settings** page has been refreshed to further simplify your experience and to unify the user interface across Textura. When editing a contract, Contract Settings now opens in a Drawer from the right.	☒Owner ☒GC ☒Subcontractor ☐Sub-tier ☐Vendor

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Reporting	Project Settings report – add new selection criteria for Project Creation Date	The **Project Settings Report** now includes a Project Creation Date filter to generate the report against a specified project creation date range.	☐Owner ☒GC ☐Subcontractor ☐Sub-tier ☐Vendor
Change Orders	Subcontractors in the UK can request Change Orders	Subcontractors operating on projects in the UK can now **request change orders.** Head Contractors have the ability to approve or reject the newly requested change orders as well as allocate to existing or new components.	☒Owner ☒GC ☒Subcontractor ☐Sub-tier ☐Vendor
VAT	VAT – create project setting to calculate VAT before retention is held	For project's located in the UK, a new project setting named "**Calculate VAT before Retention is held**" is now available to enable all contracts to calculate VAT before retention is held.	☐Owner ☒GC ☒Subcontractor ☐Sub-tier ☐Vendor

List of Bugs Resolved

Product Area	Feature	Details	Personas Impacted
Classification Tracking	Fix and update labels on Project Programs	The 'Manage Classifications' button on the Project Supplier Tracking page is now renamed to 'Manage Programs'. The following diversity standard codes are updated: - LGBT to LGBTQ (Gay, Bisexual, Transgender, Queer Enterprise) - VOSB to LBE (Veteran Business Enterprise) The following diversity codes are added: - LBE (Locally Business Enterprise) - HUBZone (Historically Underutilized Business Zone	☐Owner ☒GC ☒Subcontractor ☐Sub-tier ☐Vendor
Owner Billing	Lingering Sign Invoice action when Owner Billing is disabled	This fixes an issue where the Sign Invoice action for Parallel Signatory approval was not consumed after the Owner Billing is disabled.	☐Owner ☒GC ☐Subcontractor ☐Sub-tier ☐Vendor

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Project Settings	Project Settings – Document selection	The display order of Documents on Project Settings page has now been corrected. When selecting the 'Manage Documents' button, the Document selection drawer now appears with documents in the following order: Invoice - Sworn Statement - Unconditional Lien Waiver - Conditional Lien Waiver	☒Owner ☒GC ☐Subcontractor ☐Sub-tier ☐Vendor
Project Participants	Project Participants page does not load	This fixes an issue where the Project Participants page does not load on certain projects.	☒Owner ☒GC ☒Subcontractor ☒Sub-tier ☐Vendor
Print Draw Documents	Print Draw Documents – incorrect document displaying	This fixes an issue where the Print Draw Documents screen was displaying the Unconditional Lien Waiver from a previous draw.	☐Owner ☒GC ☐Subcontractor ☐Sub-tier ☐Vendor
Authorization	Authorization not required after Sub of Sub payment method toggled.	This fixes an issue where authorization was not required after Sub of Sub payment method toggled from ACH, to Check, and back to Check.	☐Owner ☒GC ☒Subcontractor ☒Sub-tier ☐Vendor