

Oracle
Textura
Getting Started with TPM (Europe)

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About TPM

The Oracle Textura Payment Management (TPM) system is an internet-based construction payment application submission and payment solution.

With TPM:

- ▶ Payment application documents are automatically generated, electronically signed, and available online for review and approval
- ▶ Payments are made electronically, resulting in faster access to funds
- ▶ Compliance documents can be submitted and tracked online.

Users benefit from increased productivity, lower costs, reduced risks, improved communication, and better cash flow.

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Subcontractor Invitation Email

Users receive an email to set up an account on the Oracle Textura Payment Management (TPM) system.

Note: A Textura representative or a Main Contractor invites a Subcontractor to use the TPM system.

Haven't received an invitation?

A Textura representative can resend it. Call 0845 839 8872.

- ▶ Use the first link to see user setup instructions.
- ▶ Use the second link to go to the **Create Username** page.

Create Username & Password

Use the **Create Username** page to choose a username and password.

Choose a Username

Enter a name in the **User Name** field.

Example: jsmith

Username Tips

- ▶ Use letters, numbers, or underscores (_).
- ▶ Do not use any symbols or spaces.
- ▶ Do not use more than 20 characters.

Choose a Password

Enter your password in both the **Enter Password** field and the **Re-Enter Password** field.

Example: js1960

Passwords Tips

- ▶ Include at least one letter.
- ▶ Include at least one number.
- ▶ Do not use symbols or spaces.
For example: Do not use characters from another language.
- ▶ Do not use easily guessable words.
 - ▶ Do not use names (organization name, your name, username, etc.).
 - ▶ Do not use previous passwords.
 - ▶ Avoid words commonly used as passwords.
For example: Do not use "password".
- ▶ Remember passwords are case sensitive.

Passwords Expire

When your password expires, you will be prompted to create a new one. If you are an Enterprise Administrator, see Edit Subcontractor Primary Organisation to change the password expiration.

Choose Submit

A **Status** page confirms your username and password have been created.

Haven't received an invitation?

A Textura representative can resend it to you. Call us on 0845 839 8872.

Edit Subcontractor User Profile

Use the **Edit User** page to add or change information about a user.

Enter User Information

Fill out all fields with red asterisks.

Note: These values are used to populate any project documents you must sign on the application.

- ▶ First Name
- ▶ Last Name
- ▶ User Name
- ▶ Title

(Optional) Choose a User Role

Choose from:

- ▶ **Enterprise Administrator** (Only another Enterprise Administrator can assign this role)
- ▶ **Local Administrator**
- ▶ **Regular User**
- ▶ **View Only**

Not sure which role to choose?

See Subcontractor User Permissions for more information about **User Roles**.

Enter Contact Information

Fill out all fields with red asterisks.

- ▶ E-Mail

Note: Only an Enterprise Administrator can change an email address.

- ▶ Phone Number 1

Setup Verification Phone Number

Enterprise Administrators must add **Verification Phone Numbers** as part of two-step verification. All other users can enable the two-step verification setting. Two-step verification reduces the risk of someone accessing an organisation's sensitive information by requiring something a user knows (password) and something the user has (a phone).

Note: Enterprise Administrators cannot configure this setting. All Enterprise Administrators must use two-step verification.

See Setting Up a Verification Phone Number for more information on how two-step verification protects sensitive information on TPM.

Select Notification and Permissions

- 1) Select an **Email Notification for Project Messages** preference.
 - ▶ **Email with each notification that occurs**—Each project message will be emailed to the user.
 - ▶ **Never-I will get them from my homepage**—No emails will be sent; a user can view project messages from the message link on the project home page.
- 2) Select the **Date Input Format** under the **Notification and Permissions** section.
 - ▶ **mm/dd/yyyy**
 - ▶ **dd.mm.yyy**

Note: The **dd-Mon-yyyy** is always an acceptable date format.

- 3) Select user permissions under the **User Can** section.
 - ▶ **Manage Projects**—Enter Payment Applications, manage subcontracts, and create Work Breakdown (WB)
 - ▶ **Manage Compliance**—Submit compliance documents (such as insurance certificates)
 - ▶ **Sign on Behalf of the Company**—Sign documents such as Payment Applications and VAT Invoices
 - ▶ **Payment Application Approver**—Approve or reject Payment Applications submitted by Sub-Tier Subcontractors
 - ▶ **Authorise Payments for Disbursement**—Review and authorise payments before funds are released by the disburser (Not applicable for Subcontractors)
 - ▶ **Disburse Project Funds**—Release company funds via BACS payment per period (Not applicable for Subcontractors)
 - ▶ **Disburse Enterprise Wide Funds**—Release company funds via BACS payments across multiple projects and multiple periods (Not available to Subcontractors)
 - ▶ **Manage Owner Funding**—Enter funding information and track the date an owner funds a period (Not available to Subcontractors)
 - ▶ **Manage Classified Attachments**—View any attachment that has been marked classified
 - ▶ **Manage EPP** — Select or change Early Payment Programme (EPP) settings (Not available to Subcontractors)
 - ▶ **Create Projects**—Add new projects, set up projects, and manage project users (Not available to Subcontractors)
 - ▶ **Manage Interfaces**—Control import and export of accounting information from the TPM system (Not applicable for Subcontractors)
 - ▶ **View All Organisation Projects**—View all projects enterprise wide
 - ▶ **Notarise Documents**—Electronically notarise documents. The user must be a notary.

If you change user roles or permissions after creating the user profile, you will receive an email about the change.

(Optional) Notary Information

The **Notary Information** section is only required for users who **Notarise Documents**.

- ▶ **Notary District/County**
- ▶ **Notary Municipality**
- ▶ **Notary Expiration Date**
- ▶ **Notary Certificate Number**

Accept Consent Form

If your organisation requires acceptance of a data collection consent form, you must accept the consent form before you can update Personal Information (PI) on your user profile.

- 1) Select the link to download the consent form.
- 2) After reading the form, select the tick box to accept.

Save

Once all information is complete, choose **Save Profile**.

A **Status** page confirms the profile has been updated.

Edit Subcontractor e-Sign PIN

Use the **Reset e-Sign PIN** page to create or reset a Personal Identification Number (PIN) on the system. The PIN may be used to sign documents.

Note: Only Subcontractor users with Signer or Notary roles require a PIN.

Tip

Keep this PIN in a safe location. You will may need it to sign some legal documents on the system.

Enter Current Password

This is the password you use to log in to the system.

Enter PIN Number

Create a 4-6 digit PIN to apply your electronic signature to Payment Applications and VAT Invoices on the system.

Tip

This is similar to an ATM PIN.

Re-Enter PIN

Verify your PIN by re-entering it.

Submit

Choose the **Submit** button.

A **Status** page confirms the PIN has been updated.

Note: If your company is already established on the system, this is the last step to complete user setup.

Updating the My Organisation Profile Page for Subcontractors

To update your organisation profile on the **My Organisation Profile** page:

- 1) Navigate to the **My Organisation Profile** Page.
 - ▶ This page displays automatically as a part of the account setup process.
 - ▶ Select the **My Organisation Profile** link from under your organisation name at the top of any page.

Note: Only Enterprise Administrator can edit an organisation.

- 2) In the **General Information** section, complete all required fields. Required fields are marked with a red asterisk.
- 3) In the **VAT ID** field, enter your VAT ID.
- 4) Set your **Default Translation**.
- 5) (Optional) Add a diversity status.
Select the **Manage Classifications** button to open a dialogue box.
- 6) (Optional) Select and update business settings.
- 7) In the **Bank Information** section, complete all required fields. Required fields are marked with a red asterisk. Fields required for payment are marked with blue asterisks.
Only Enterprise Administrators in your organisation can see or change your bank account information. Once entered, only the last four digits of the bank account number will display on this page.
- 8) Select the **Save Changes** button.
A **Success** page appears, confirming you saved the page.
- 9) (Optional) Select the **My Organisation Settings** link to go to a page to select additional settings for your organisation.

Choosing Organisation Settings for Subcontractors

After completing your organisation profile, you can select additional settings for your organisation. These settings are optional, and you can change them at any time from the **My Organisation Settings** page.

To edit your organisation settings:

- 1) Navigate to the **My Organisation Settings** page.
 - ▶ From under your organization name at the top of any page, select **My Organization Settings**.
 - ▶ From the bottom of the **My Organization Profile** page, select the **My Organization Settings** link.
- 2) Select organisation settings.
 - ▶ From the **Default Date Input Format** drop-down, select a date input format the application will use to display date stamps.
 - ▶ From the **Days before passwords expire** drop-down menu, select how many days should pass before user passwords expire.
 - ▶ (Optional) Add segments to organise projects into custom groups.
 - ▶ (Optional) Use the **Manage Data Collection** button to set up a data consent form.
 - ▶ Choose additional organisation settings.

For a list of available settings, see the **Organisation Administration Overview for Subcontractors** https://docs.oracle.com/cd/E97085_01/TPMhelp/en/Europe/10314161.htm and **Project Administration Overview for Subcontractors** https://docs.oracle.com/cd/E97085_01/TPMhelp/en/Europe/10314162.htm topics.
- 3) Select the **Save Changes** button.
A **Success** message appears, confirming you saved the page.
- 4) (Optional) Select the **My Organisation Profile** link to go to a page to edit your organisation profile.

Confirming a Contract for Subcontractors

To participate as a Subcontractor in a project on the system, you must confirm the contract.

Need an invitation?

Only administrators can confirm contracts. If you have not received an invitation, a Textura representative can resend it. Contact Oracle support.

To confirm a contract:

- 1) Navigate to the **Confirm Contract** page.
You can reach the **Confirm Contract** page three ways:
 - ▶ From the **Accept Participation** email, use the link
 - ▶ From the **Tasks** page, choose **Confirm Contract**
 - ▶ Under **Project Actions** on the **Project Home** page, choose **Confirm Contract**.

Note: Multiple **Confirm Contract** tasks group beneath a collapsed category header. Choose the **Show Confirm Contract** header to show all available tasks.

- 2) On the **Confirm Contract** page, review your contract information.
-

Notes:

- The usage fee for this project is displayed and will be taken from your bank account or charged to your credit card once you choose **Confirm**.
 - You cannot accept a contract if your country location does not match the country where the funding organisation's bank is located. If you cannot accept the contract for this reason, please contact support. You will need to create a new organisation on Textura with banking information in the country of the project in which you are participating to accept the contract.
 - Oracle does not allow Subcontractor usage fees to be paid by cheque. Before your contract can be accepted or completed, you must update your organisation profile to select a different payment method.
-

- 3) Choose **Confirm**. The usage fee is immediately collected, and a **Status** page indicates the contract has been confirmed.

Tips

▶ **Contract Signatory**

Some projects will require contact information for the person who signed the contract. If the fields are on the **Accept EPP Enrollment** screen, fill them in before choosing to **Accept** or **Ask Again Later**. The **Contract Signatory** section includes the following fields:

- ▶ **First Name**
- ▶ **Last Name**
- ▶ **Phone Number**
- ▶ **Email Address**

▶ **Missing Change Orders**

You can confirm the contract and contact the Main Contractor or Prime Subcontractor to ask about change order status.

▶ **Payment Applications**

You must confirm the contract before submitting a payment application.

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