

Oracle
**Textura Payment Management
Documents Management for General Contractors**

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Title and Copyright Information

Oracle Textura Payment Management Documents Management for General Contractors

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Introduction to Document Templates

The Documents feature in Textura Payment Management empowers General Contractors and Owners to efficiently create and manage lien waiver templates and publish both lien waiver and other key project documentation for projects managed on Textura.

Only users with Documents permissions will have access to this feature from their **Tools** menu. An Enterprise or Local Administrator can assign the **Editor**, **Publisher**, and **View Only Documents** roles to any user in your organization.

Watch the Documents video.

https://players.brightcove.net/2985902027001/default_default/index.html?videoId=6390283819112

High-Level Overview

- 1) **Access the Documents Library** (see "**Navigate to the Documents Page**" on page 29): Navigate to the **Documents** page to view all available document templates and begin the creation process.
- 2) **Create a Document Template**: Select **New Template** to open the **Template Properties** page. Name the document, select the document type (conditional or unconditional lien waiver), choose the organization type, and configure additional settings if needed.
- 3) **Edit the Document Template**: Use the **Document Editor** to add and format text, insert tables, include images, and add variables such as project details, signatures, or dates. Advanced features include adding conditional logic and page breaks.
- 4) **Preview and Review**: Generate a preview to verify document template appearance and content. When complete, submit the template for review.
- 5) **Publish the Document**: Once reviewed and approved, users with the Publisher user permission publish the document template to make it available for use on projects managed within Textura.
- 6) **Deploy on Projects**: Project Managers can select published document templates to use in new or ongoing projects on the **Project Settings** page.

FAQs

Who can create and edit documents in Textura? (see page 31)

What is a legacy document? (see page 31)

When previewing templates, why is my project drop-down list different than that of another Documents user at my organization? (see page 31)

Why can I not see signatures on my previews? (see page 31)

What types of documents can I create? (see page 31)

Can I upload a document to the Editor? (see page 31)

Can I create a document template for Lien Waiver Only Sub Tier organizations on my project? (see page 31)

What is the difference between Effective Date and Draw Period To Date? (see page 32)

Can I define a calculation in a table? (see page 32)

Can I log directly into the Documents Editor? (see page 32)

Other Resources

- ▶ **In-App Help:** In the application, click the ? > **Help for this Page** in the top right corner of your page. The Help topics presented are context sensitive to the page you are on.
- ▶ **Documentation Library** (https://docs.oracle.com/cd/E97085_01/10313806.htm)
- ▶ **Support** (https://docs.oracle.com/cd/E97085_01/10313339.htm)

Document Templates Best Practices

Formatting Document Templates

- ▶ To save yourself some time, copy and paste the text from a document you already have saved to your computer or accessed online. You will still need to adjust formatting and insert variables, but you will not need to manually type out everything if you approach your template creation in this way.
- ▶ Before adding a variable, resize and format your document template's text if you need to make any adjustments.
- ▶ Pressing **Enter** on your keyboard will add a double space to your document template. To instead add a single space, press **Shift + Enter**.
- ▶ You can use tables to mimic a signature block in your document template. Insert a table and adjust the table properties, cell properties, and cell borders to specify text alignment and display. By default, cell borders are not visible, but choosing to include the bottom border can act like an underline.

Keyboard Shortcuts

You can use the following keyboard shortcuts to make editing simpler:

- ▶ **CTRL + A:** Select all text in the document template. You can then use the **Document Editor Ribbon** to apply text styling and alignment to the entire document template.
- ▶ **CTRL + C:** Select text and then use the keyboard shortcut to copy the text to your clipboard.
- ▶ **CTRL + X:** Select text and then use the keyboard shortcut to cut the text from your document template.
- ▶ **CTRL + V:** Paste the text you either cut or copied from your clipboard to your document template.
- ▶ **CTRL + Z:** Undo your previous action.
- ▶ **CTRL + Y:** Redo an action you previously undid.

Creating a Document Template

Create a document template to use on your organization projects on Textura.

To create a document template:

- 1) **Navigate to the Documents Page** (see page 29).

The **Documents Library** page displays.

- 2) Click **New Template**.

The **Template Properties** page displays.

- 3) Enter a name and select a document type.

Note: Currently, you can only create conditional and unconditional lien waivers. Lien waiver creation for Lien Waiver Only Sub-Tiers (LW Subs) is not supported.

- 4) Select the **Organization Type** to determine if General Contractors or Subcontractors will use this document.

- 5) Optional. Choose a **Page Type**.

The application defaults to selecting the Letter (8.5 x 11) option, but you can choose to change the **Page Type** to A4 (8.3 x 11.7 in) or Legal (8.5 x 14 in).

- 6) Optional. Use the drop-down menus to change the page margins of your document template.

- 7) Click **Update**.

The **Document Editor** opens. The editor in **Documents** offers a range of formatting options to offer you some control over text appearance, styling, and alignment.

Text entered in the **Document Editor** defaults to 12pt Helvetica font.

- 8) Begin entering text for your document template.

Note: You can paste content from your clipboard into the **Document Editor**. All formatting except hard returns will be stripped from the source and must be re-applied in the **Document Editor**.

- 9) (Optional) Adjust styling by adding a table.

See ***Adding a Table to a Document Template***.

- 10) (Optional) Add a header and footer.

See ***Adding a Header or Footer to a Document Template***.

- 11) Either highlight entered text or place your cursor where you would like to add a variable.

- 12) From the **Document Editor Ribbon**, add a variable.

- ▶ **Variable Plugin:** Add a plugin to pull information from a project, contract, or organization profile into the document template, as well as Signer, Notary and custom-defined variable data.

Note: All document templates need a signature variable.

- ▶ **Conditional Tags:** Add a pair of conditional **begin** and **end** tags that apply to the content entered between the tags.

For example: Use a conditional plugin to display text only when users sign a final unconditional lien waiver.

See ***Using Conditional Start and End Tags in Document Templates*** for more information on how to add **Start** and **End Tags** to add a conditional variable.

13) After finishing the document template, you can:

- ▶ **Cancel:** Select **Cancel** to return to the **Document Properties** page.
- ▶ **Preview:** Select **Preview** to see a preview of the document template.
- ▶ **Submit:** Select **Submit** to begin the Publisher workflow.
 - The **Document Editor** closes.
 - The document template's name, status, type, and creation information displays in a new line in the table on the **Document Library** page.

Watch the Working with a Document Template video.

https://players.brightcove.net/2985902027001/default_default/index.html?videoid=6390395937112

Watch the Using Variables in Document Editor video.

https://players.brightcove.net/2985902027001/default_default/index.html?videoid=6390398431112

Using Conditional Start and End Tags in Document Templates

Editors can define conditional logic by adding **Start** and **End Tags** to conditionally expose content of the document based on specified criteria.

For example: An unconditional lien waiver might need different language depending on if an organization submitted a progress or final invoice for the project.

To use conditional **Start** and **End Tags** while creating a document template:

- 1) In the **Document Editor**, place the cursor where you want to add the conditional logic.
- 2) From the top of the **Document Editor**, click the **Conditional Plugin** icon.
A **Conditional Statement** drawer opens on the left of the page.
- 3) From the **Condition** drop-down list, select a condition to use in the document template.
- 4) Click **Insert Start Tag**.
- 5) In the body of the **Document Editor** after the **Start Tag**, enter the text that will display when the selected condition is met.
- 6) From the **Condition Statement** drawer, click **Insert End Tag**.

Watch the Setting up Conditional Logic in Document Editor video

https://players.brightcove.net/2985902027001/default_default/index.html?videoid=6390399917112.

Adding a Table to a Document Template

Document templates created on Textura support tables.

To add a table to a document template:

- 1) Move your cursor to the area of the document template where you want to add a table.
- 2) From the **Document Editor Ribbon**, select the **Insert Table** icon.
A **Table Widget** displays.
- 3) From the **Table Widget**, select the number of columns and rows for the table.

The **Document Editor** supports initial table sizes as small as one row by one column and as large as 10 rows by 10 columns. After creating the table, you can use the **Table Menu** to add additional columns or lines.

4) (Optional) Edit column options.

Select a table cell and then select the **Edit Column** icon to open a list of table options related to columns.

- ▶ **Header Column Toggle:** Determine if the selected column and all columns to the left of it should use styling reserved for table headers.
- ▶ **Insert Column Left:** Add a column to the left of your selected column.
- ▶ **Insert Column Right:** Add a column to the right of the selected column.
- ▶ **Delete Column:** Remove the selected column from the table. After deleting a column, your cursor will move to and select the next column to the right.
- ▶ **Select Column:** Highlight and select all table cells in a column.

5) (Optional) Edit row options.

Select a table cell and then select the **Edit Row** icon to open a list of table options related to rows.

- ▶ **Header Row Toggle:** Determine if the selected row and all rows above it should use styling reserved for table headers.
- ▶ **Insert Row Above:** Add a row above your selected row.
- ▶ **Insert Row Below:** Add a row below your selected row.
- ▶ **Delete Row:** Remove the selected row from the table. After deleting a row, your cursor will move to and select the next row under it.
- ▶ **Select Row:** Highlight and select all table cells in a row.

6) (Optional) Merge cells.

Select one or more table cells you want to merge or split.

- ▶ **Merge cell up:** Combine a table cell with the cell above it.
- ▶ **Merge cell down:** Combine a table cell with the cell below it.
- ▶ **Merge cell left:** Combine a table cell with the cell to the left of it.
- ▶ **Split cell vertically:** Split a table cell in two. When splitting vertically, the new cell displays below the original.
- ▶ **Split cell horizontally:** Split a table cell in two. When splitting horizontally, the original cell and the new cell display side-by-side.

7) (Optional) Edit table properties.

Customize the appearance of the entire table.

- ▶ **Border:** Add a border to the table.

Border options include:

- **Top:** Add a border to the top of the table.
- **Right:** Add a border to the right side of the table.
- **Bottom:** Add a border to the bottom of the table.
- **Left:** Add a border to the left side of the table.

Note: You can also use the **Bottom Border** option as a way to fully underline a table, including its padding. If you use the **Underline** font styling, the underline applies to only the variable or text.

- **All:** Add a border to all sides of the table.
- ▶ **Background:** Add a color to the background of the table. Select from 15 available colors or use the **Color Picker** to choose a custom color.
- ▶ **Alignment:** Choose how to align text in the table. Text uses the **Center Table** option by default, but you can choose to align text to the left or the right.

After updating table properties, you need to select **Save** in the **Table Properties** dialog box to apply your options to the table.

8) (Optional) Edit cell properties.

Edit the appearance of a selected table cell.

- ▶ **Background:** Add a color to the background of a table cell. Select from 15 available colors or use the **Color Picker** to choose a custom color.
- ▶ **Padding:** Choose the amount of spacing a table cell should use between text and the perimeter of the cell.
- ▶ **Table cell text alignment:** Choose how to align the text in a table cell.

9) (Optional) Add cell borders.

Select one or more cells in your table and then select border options.

Border options include:

- **Top:** Add a border to the top of your selection.
- **Right:** Add a border to the right side of your selection.
- **Bottom:** Add a border to the bottom of your selection.
- **Left:** Add a border to the left side of your selection.

Note: You can also use the **Bottom Border** option as a way to fully underline a cell, including its padding. If you use the **Underline** font styling, the underline applies to only the variable or text.

- **All:** Add a border to all sides of your selection.

After you add a border, you need to select **Save** in the **Cell borders** dialog box to apply your options to the table.

10) (Optional) Change cell border properties.

Change the appearance of the border of a cell. Select one or more cells in your table and then select border options.

- ▶ **Style:** Choose solid lines or no lines.
- ▶ **Color:** Choose a color for visible border lines from a predefined list of options.
- ▶ **Width:** Choose the width of a border line. You can choose a line weight of 1px to 5px.

After updating cell border properties, you need to select **Save** in the **Cell borders** dialog box to apply your options to the table.

Deleting Table Elements from a Document Template

To remove a table from a document template:

- 1) In the **Document Editor**, select the icon in the upper left corner of the table to highlight the entire table element.
- 2) Use the **Delete** or **Backspace** buttons on your keyboard to delete the table.

Note: You will also use this method if you need to remove a row from a single-row table. To remove a row from a multiple-line table, you will use the **Table Menu** from the **Document Editor Ribbon**.

Adding a Header or Footer to a Document Template

To add a header or footer to the document template from the **Document Editor**:

- 1) From the top of the **Document Editor**, select the **Header** tab to add a header or the **Footer** tab to add a footer.
 - ▶ From the **Template layout** drop-down, choose how many columns the header or footer should contain. Textura supports up to three columns.

Each column will include **Content Type** options.

- ▶ **Text:** Add text to display in the header or footer on each page of the document template. The default alignment of content within the column depends on how many columns you choose for your header or footer.
 - **One Column:** Text is center-aligned.
 - **Two Columns:** The first column's text uses a left-alignment and the second uses a right-alignment.
 - **Three Columns:** The first column uses a left-alignment, the second uses a center-alignment, and the third uses a right-alignment.
- ▶ **Page Number:** Insert page numbers across all pages in the document template.
- ▶ **Image:** Upload an image to display in the header or footer of every page of the document template.
- ▶ **Variable:** Select a variable to include in the header or footer of each page.
- ▶ **N/A:** Do not include any content in the header or footer. Use this option if you chose to include multiple columns and want a column to contain only blank space.

Note: You can only choose one **Content Type** per header or footer column.

- 2) (Optional) Add text to a column.
 - a. Choose a **Typeface**.

Typefaces include Helvetica, Times New Roman, and Courier New. Before you choose an option, the typeface defaults to Helvetica.
 - b. Select a **Font Size**.

Headers and footers support font sizes from 8pts to 18pts. Before you choose an option, the font size defaults to 12pts.

- c. If applicable, apply bold or italicized styling.
 - d. In the **Content** field, enter custom text to display in the header or footer of every page.
- 3) (Optional) Add a **Page Number**.
- a. Choose a **Display Option**.
 - b. Choose a **Typeface**.
Typefaces include Helvetica, Times New Roman, and Courier New. Before you choose an option, the typeface defaults to Helvetica.
 - c. Select a **Font Size**.
Headers and footers support font sizes from 8pts to 18pts. Before you choose an option, the font size defaults to 12pts.
 - d. If applicable, apply bold or italicized styling.
- 4) (Optional) Add an image.
Either drag an image from your computer into the page or use the **File Explorer** to navigate to the location of your image.
- 5) (Optional) Include a **Variable**.
- a. From the **Variable** drop-down, choose a variable. Available variables include: **Signing Date**, **Project Name**, and **Signing Organization Name**.
 - b. Choose a **Typeface**.
Typefaces include Helvetica, Times New Roman, and Courier New. Before you choose an option, the typeface defaults to Helvetica.
 - c. Select a **Font Size**.
Headers and footers support font sizes from 8pts to 18pts. Before you choose an option, the font size defaults to 12pts.
 - d. If applicable, apply bold or italicized styling.
- 6) (Optional) Select **N/A** to create a blank header or footer column.

Previewing a Document Template from the Document Library

To generate a document template preview from the **Document Library** page:

- 1) **Navigate to the Documents Page** (see page 29).
- 2) Select a document template from the **Document Library** table.
- 3) Click **Preview**.
A **Preview Template** drawer opens on the right side of the page.
- 4) In the **Preview Template** drawer, select a project, contract, and draw from the available drop-down lists. Textura will use information from these selections when generating the document template preview. You will only see projects available to you across your organization.
- 5) Optional. Select a check box to configure the preview to include additional options:
 - ▶ **Final**: Generate a preview of how a final document may look when signed by an organization.

- ▶ **Progress:** Generate a preview of how a progress document may look when signed by an organization.
 - ▶ **Notary:** Generate a preview of how a document may look when you define conditional logic for notary actions.
- 6) Click **Create**.
 - 7) From the **Document Library**, click **View Previews**.
The **Preview** page displays.
 - 8) From the table on the **Previews** page, select the document template to preview.
The document template preview opens in a drawer on the right side of the page.

Previewing a Document Template from the Document Editor

You can preview a document template while creating or editing a template in the **Document Editor**.

To preview a document template:

- 1) From the **Document Editor**, select **Preview**.
A **Preview Template** drawer opens.
- 2) From the **Project** drop-down, select a project to use for the preview.
Only documents in which you have access will populate this list.
- 3) Choose a contract to use for the preview.
- 4) Select a draw.
- 5) (Optional) Choose to base the generated document template off of a final lien waiver.
- 6) (Optional) Choose to include variable fields in the document template.
- 7) Select **Create**.
 - ▶ A **Creating Preview** message displays at the bottom of the page while the document preview generates.
 - ▶ When ready, the document preview immediately opens in a dialog box.
 - ▶ You can choose download or print the document template.
- 8) Select **Cancel** to close the dialog box.

Note: When you generate a document template preview from the **Document Editor**, the preview will not display on the **Previews** page. Only document template previews generated from the **Document Library** display on that page.

Publishing a Document Template

Users with the Publisher role can publish the documents an Editor created for use on projects within Textura.

To publish a document:

- 1) **Navigate to the Documents Page** (see page 29).

- 2) From the **Document Library**, select the desired document template that has been submitted for publishing and click **Review**.
The document's properties display.
- 3) If the selected properties look correct, click **Continue**.
A **Review** drawer opens on the right side of the page.
- 4) From the **Review** drawer, select a project, contract, and draw from the available drop-down lists.
- 5) (Recommended) Review both a final and in progress version of the document. You can also choose view notarization elements that may be conditionally displayed.
- 6) Click **Review**.
A message displays, informing you Textura is generating a preview. The preview then opens in a dialog box.
- 7) From the dialog box, click **Publish**.
 - ▶ The dialog box closes.
 - ▶ The document's status changes to **Published** in the **Document Library** table.
 - ▶ Project Managers can now select the published document from the **Project Settings** page for use on a project.

Watch the Publishing Document Templates video.

https://players.brightcove.net/2985902027001/default_default/index.html?videoid=6362674759112

Additional Information

This section includes additional information about the pages mentioned in this guide. View these topics for an overview of table or setting field names and definitions.

Working With the Documents Library Page

Document Name	Project Count	Status	Type	Created On	Created By	ID
Unconditional Lien Waiver	0	Draft	Unconditional Lien Waiver	11/20/2025	David Jones	12888
Test 1	0	Draft	Unconditional Lien Waiver	11/19/2025	David Jones	12887
G702/705 with Stored Material Tracking	1	Published	Invoice	8/21/2025	Textura Administrator	12098
G702/705 with 3 GC MASI signatures & basic sworn	2	Published	Invoice	8/21/2025	Textura Administrator	12095
G702/705 with Change Orders & Sub Draw # (1 GC MASI)	5	Published	Invoice	6/26/2025	Textura Administrator	11204
Phase Code-based Sworn Statement with CO and Contractor Address	5	Published	Sworn Statement	3/14/2025	Textura Administrator	9528
G702/705	13	Published	Invoice	3/10/2025	Textura Administrator	9450
Standard	14	Published	MA SI	10/3/2024	Textura Administrator	6897
Unconditional Arizona Lien Waiver	2	Published	Unconditional Lien Waiver	10/3/2024	Textura Administrator	5979
G702/705 with Stored Material Tracking - 3 MASI Sig	1	Published	Invoice	10/3/2024	Textura Administrator	5161
Basic Sworn Statement	3	Published	Sworn Statement	10/3/2024	Textura Administrator	4554
G702/705 - Draft	7	Published	Draft Invoice	10/3/2024	Textura Administrator	3788
Generic Lien Waiver	14	Published	Unconditional Lien Waiver	10/3/2024	Textura Administrator	5048

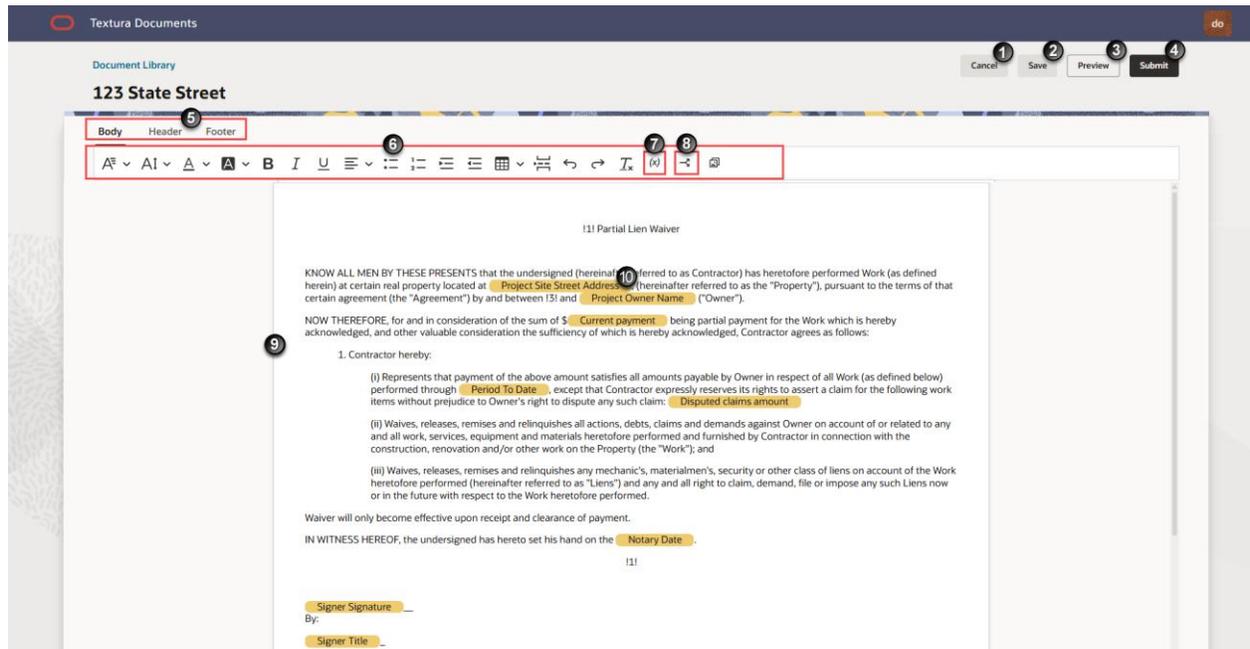
- Document Search:** Find specific document templates available to your organization based on your unique search input. Searches include content from all columns of the table, not just the document template name.
- Filters:** Select one or more of the predefined filters to the right of the search bar to quickly filter the table to only show specific document templates that fit your selected criteria. Some filters require you to further define constraints after selecting them. When available, choose additional options from the drop-down list in the search bar.
- View Previews button:** Open a **Previews** page to view all recent document template previews you generated.
- Preview:** Generate a preview of a selected document template. Choose options from the **Template Preview** drawer to preview how the document would look for a specific project, draw, or contract. You can also optionally choose to generate a preview of a final invoice or include notarization, if the document template supports these features.
- Properties:** View information about a document template you selected from the **Document Table**. On the **Properties** page, the document template's supported properties are marked with a check mark.

Note: The **Properties** page is read-only. You cannot make changes to the document template here.

- Review:** Before a document template becomes available for selection on a project, it must be reviewed, approved, and published. Select any document template from the **Document Table** with an **In Review** status to activate the **Review** button. Click **Review** to open document template information in a drawer on the right side of the page. Only users with Documents Publisher permissions can review, approve, and publish documents.
- New Template:** Create a new document template.

- 8) **Edit:** Update an existing document template's properties and formatting.
- 9) **Copy:** Copy an existing document template's properties to create a new document template.
- 10) **View Projects:** Select a document template from the table and then select **View Projects** to open a **Projects** drawer on the right side of the page. The **Projects** drawer lists the projects currently using the selected document template. Additional project details include **Project Number** and **Status**. You can export this information as a CSV file.
- 11) **My Org Documents | All Documents:** Filter the table to display only document templates that are in **Draft** status or used by your projects, or view all available templates.
- 12) **Document Table:** By default, the table lists all document templates available to your organization in order of creation with newer document templates appearing at the top of the list. There are six columns in total:
 - ▶ **Document Name:** The name of the document template.
 - ▶ **Project Count:** The number of active projects using the document template.
 - ▶ **Status:** The current status of a listed document template.
 - **Draft:** An Editor has begun to create a document template but has not yet submitted the template for publishing by pushing it forward to the reviewer.
 - **Legacy:** The document is a generic document available to all organizations.
 - **In Review:** The Editor has completed drafting the document template and sent it forward to the review stage. The Publisher needs to either approve or reject it. Once approved, the document template moves to the **Published** state.
 - **Published:** The Publisher chose to publish the document template. The document template is now available to use on any project where your organization acts as the General Contractor.
 - ▶ **Type:** The way a document is classified on Textura. Document types include lien waiver (CLW), unconditional lien waiver (LW), invoice, and sworn statement.
 - ▶ **Created On:** The date the document template became available for use in Textura. All legacy documents have the same date. Newer document templates created by your Textura representative have different dates.
 - ▶ **Created By:** The name of the individual who created the document template. Generic documents available to all organizations list Textura-Legacy as the creator. Documents created by your Textura Representative list Textura Administrator as the creator.
 - ▶ **ID:** A number used to identify the document template in Textura. The template ID is based on order of creation and is useful for Support if you need to contact Textura for help.

Working with the Documents Editor



- 1) **Cancel:** Cancel document template editing and return to the **Document Library** page.
- 2) **Save:** Save your most recent changes to the document template. Consider frequently saving your work to prevent accidental loss of content if you navigate away from the page or experience a connection issue.
- 3) **Preview:** Generate a preview of the document template. When you preview a document template, you will pick a project, contract, and draw to use as context for the preview so you can visualize how the document will look when presented to a Signer.
- 4) **Submit:** Save and submit the document template for publishing. The document template's status changes to **In Review** on the **Document Library** page.
- 5) **Formatting Tabs:** Select a tab to edit different sections of the document template.
 - ▶ **Body:** Access the workspace to add text and variables to your document template. This is where you will add the main content of your template.
 - ▶ **Header:** Add a header to the pages of your document template. Headers support up to three columns.
See ***Adding a Header or Footer to a Document Template*** for more information.
 - ▶ **Footer:** Add a footer to the pages of your document template. Footers support up to three columns.
See ***Adding a Header or Footer to a Document Template*** for more information.
- 6) **Document Editor Ribbon:** Change the format of text in the **Document Editor** or add a plugin.

From left to right, available formatting options include:

- ▶ **Font Family:** Select a font for the document template. Available options include Helvetica, Times New Roman, and Courier New.

- ▶ **Font Size:** Control the size of the font in the document template. The **Default** option applies size 12 to your font. You can select a minimum size of 1px and a maximum size of 18px.
- ▶ **Font Color:** Change the color of the font in your document template. Either choose a predefined color or use the color picker tool to enter a hex code or select a color from a color map.
- ▶ **Highlighter:** Highlight a section of text in the document template. Either choose a predefined color or use the color picker tool to enter a hex code or select a color from a color map.
- ▶ **Bold:** Apply bold or strong styling to text.
- ▶ **Italic:** Apply italic styling to the text.
- ▶ **Underline:** Underline text in the document template.
- ▶ **Text Alignment:** Choose how to align text in the document template. Alignment defaults to left-aligned, but you can choose to align the text right, center, or justified.
- ▶ **Bulleted List:** Add a bulleted list to the document template. You can also create sub-bulleted lists by increasing the indentation of a bullet.
- ▶ **Numbered List:** Add a numbered list to the document template. You can also create sub-numerical lists by increasing the indentation of a numbered list. The first level of a sub-numerical list will adopt a lower-alpha formatting. A sub-numerical list under a lower-alpha formatted list will use lower-roman formatting.
- ▶ **Increase Indent:** Increase the indentation of text on the left side of the document template.
- ▶ **Decrease Indent:** Decrease the indentation of text on the left side of the document template.
- ▶ **Insert Table:** Insert a table into the document template. After adding a table, you can use the **Table Menu** to add or remove rows and columns, change background colors, and select border settings.

See ***Adding a Table to a Document Template*** for more information about how to add and edit tables in the **Documents Editor**.

- ▶ **Page Break:** Add a page break to your document template. A page break will move you to a new page in the document template
 - ▶ **Undo:** Undo the most recent action you took in the **Document Editor**.
 - ▶ **Redo:** Only available after you undo an action. Reverse the most recent text or formatting you chose to undo.
 - ▶ **Remove Format:** Remove the formatting you applied to text in the **Document Editor**.
 - ▶ **Plugins:** The text ribbon includes variable options for the document template. Refer to numbers 6 and 7 for more details.
 - ▶ **Insert Image:** Add an image to the document template. Textura supports both JPEG and PNG file types. After adding an image, you can move and resize it within the template. The image will display in both the document template and any previews of the template that you generate.
- 7) **Variable Plugin:** Select the icon to open a drawer on the left side of the page. From the drawer, you can select a plugin to pull data from a project, contract, or draw into the document template.

For example: Select the **Project Name** standard variable to insert the Textura project name into the document template at the time of signing, or select the **Signer Signature** Signer variable to add a placeholder for the electronic signature of the Signer of the document.

- 8) **Conditional Plugin:** Select the icon to open a drawer on the left side of the page. From the drawer, you can use tools to insert **Start** and **End Tags** to define conditional logic Textura will apply to the content of the document.

For example: In the case of a final invoice, specify an "If Final" **Start Tag** and **End Tag** to display text that is specific to a Full and Final Lien Waiver. When a user signs a full and final lien waiver, the content entered between the **Start Tag** and **End Tag** displays in their document. This content will not display on a progress lien waiver.

See ***Using Conditional Start and End Tags in Document Templates*** for how to create and use a conditional plugin.

- 9) **Document Template:** Use the **Document Template** as your workspace for text and formatting.
- 10) **Variable Token:** Signifies the addition of a variable to the document template. Variable tokens help you visualize the placement of key information in your document template.

Standard Variable Overview

Variable	Description	Type
Amount yet to be disbursed	Sum of net invoices received that have not been disbursed; Contract Status total pending	numeric
Balance to finish	Contract sum to date less total earned and retainage; G702 line 9	numeric
Billed amount to date	Total completed and stored to date; G702 line 4	numeric
Billed this period	Sum of work completed this period and material presently stored, as entered in G703	numeric
Bonding institution	Bonding institution specified in project settings	text
Contract date	Contract date of the signing organization	date
Contract description	Contract description	text
Contract number	Contract number of the signing organization	text
Contract sum to date	Sum of original contract amount and net change by change orders; G702 line 3	numeric

Documents Management for General Contractors

Contractor project manager first name	First name of the contractor project manager, as specified in project settings	text
Contractor project manager last name	Last name of the contractor project manager, as specified in project settings	text
Contractor project manager phone	Phone number of the contractor project manager, as specified in project settings	text
Count of applications submitted	Number of draws in which the organization has submitted an invoice	numeric
Current payment due	Payment this period; G702 line 8	numeric
Current payment, previous draw	Sum total of current payment due for all invoices prior to current period; G702 line 7	numeric
Default retention percent	Default retention percent on the contract, a defined in contract settings	numeric
Disbursed amount	Sum total amount disbursed on the contract, where status is disbursed or paid	numeric
Draw due date	Draw due date entered on the initiate draw page	date
Draw name	Draw name	text
Draw/Application number	Draw number in TPM; Application number on G702	numeric
Effective date	Defaults to draw period to date unless a different date is allowed at time of signing.	date
Funding organization address line 1	Address line 1 of funding organization for the project	text
Funding organization address line 2	Address line 2 of funding organization for the project	text
Funding organization city	City of funding organization for the project	text
Funding organization county	County of funding organization for the project	text

Funding organization name	Name of organization specified as the funds disburser on the project, which may or may not be the primary GC organization	text
Funding organization phone number	Phone number of funding organization for the project	phone
Funding organization state	State of funding organization for the project	text
Funding organization state, abbreviated	State abbreviation of funding organization for the project	text
Funding organization tax ID	Funding organization tax id	text
Funding organization zip code	Zip code of funding organization for the project	text
General contractor address line 1	Address line 1 of primary GC organization	text
General contractor address line 2	Address line 2 of primary GC organization	text
General contractor city	City of primary GC organization	text
General contractor county	General contractor county	text
General contractor name	Name of primary GC organization, regardless of funding organization for the project	text
General contractor phone number	Phone number of primary GC organization	phone
General contractor project number	Project number as entered by the GC	text
General contractor state	General contractor state/province (or other country defined subdivision)	text
General contractor state (abbreviated)	General contractor abbreviated state/province (or other country defined subdivision)	text
General contractor tax ID	General contractor tax id	generic
General contractor zip code	Zip code of GC organization	text
Invoice number	Invoice number as system generated or entered in billing	text

Documents Management for General Contractors

	details during invoice workflow	
Lender	Lender listed on the project.	text
Materials this period	Materials presently stored, as entered in invoice and displayed in G703	numeric
Net change by change orders	Sum of all change orders; G702 line 2	numeric
Net retention this period	Net total of retention held and retention requested this period	numeric
Organization role	Role of the organization of the person signing the document	text
Original contract amount	Original contract sum when first draw was initiated; G702 line 1	numeric
Parent contract date	Parent organization contract date	date
Parent contract description	Parent organization contract description	text
Period from date	Draw period from date	date
Period to date	Draw period to date	date
Period to date of last disbursement	Period to date of prior invoice	date
Previous certificates for payment	Sum total of current payment due for all invoices prior to current period; G702 line 7	numeric
Previous draw number	Draw number of the previous submission	numeric
Previous period to date	Draw period to date of previous invoice submission	date
Project name	Project name	text
Project number	Project number as entered by the person signing the document	text
Project owner city	Project owner's city	text

Project owner county	Project owner's county	text
Project owner name	Owner name	text
Project owner organization type	Project owner's organization type	text
Project owner phone number	Project owner's phone number	phone
Project owner state	Project owner's state	text
Project owner state (abbreviated)	Project owner's state, abbreviated	text
Project owner street address	Complete street address of project owner (includes address lines 1 and 2)	text
Project owner ZIP code	Project owner's ZIP code	text
Project site city	Site information city	text
Project site county	Project site county	text
Project site legal description	Project settings, site information property legal description	text
Project site name	Site information site name	text
Project site owner	Site property owner	text
Project site state	Project site state/province (or other country defined subdivision)	text
Project site state (abbreviated)	Project site abbreviated state/province (or other country defined subdivision)	text
Project site street address	Complete street address of project site	text
Project site ZIP code	Site information ZIP code	text
Remit to address, city, state, & zip	Project remit to address, city, state, & zip	text

Remit to city & zip	Project remit to city & zip code	text
Remit to name	Project remit to name	text
Remit to street address	Project remit to street address	text
Retention held this period	Retention held this period regardless of retention requested	numeric
Retention previous period to date	Sum of all retention held prior to this period regardless of amounts released	numeric
Retention requested this period	Amount of retention requested this period	numeric
Total earned less retainage	Total completed and stored to date less retainage, G702 line 6	numeric
Total payments	Payment to date	numeric
Total retainage	Net retention (held less requested) for the life of the project; G702 line 5	numeric
User defined text 1	User defined text 1, as defined in project settings	text
User defined text 2	User defined text 2, as defined in project settings	text
Work completed prior to this period	Sum total of work completed from previous applications; G703 column D	numeric

Signer Variable Overview

Variable	Description	Type
Signer address line 1	Signer's address line 1	generic
Signer address line 2	Signer's address line 2	generic
Signer city	City of person signing document	generic
Signer email address	Signer's email address	generic
Signer fax	Fax number of person signing document	phone
Signer name	Name of person signing document	generic

Signer name (initials)	Initials of person signing document	generic
Signer organization name	Organization of person signing document	generic
Signer organization type	Organization type of person signing document	generic
Signer phone	Phone number of person signing document	phone
Signer postal code	Signer's postal code	generic
Signer signature	Electronic signature of signer	generic
Signer state	State of person signing document	generic
Signer state (abbreviated)	Signer's state, abbreviated	generic
Signer title	Title of person signing document	generic
Signing date	Date signed	date
Signing organization address line 1	Address line 1 of the signing organization	generic
Signing organization address line 2	Address line 2 of the signing organization	generic
Signing organization city	City of organization of person signing the document	generic
Signing organization country	Country of the organization of person signing the document	generic
Signing organization county	County of the organization of person signing document	generic
Signing organization phone	Primary phone number of the organization of person signing the document	phone
Signing organization postal code	Postal code of the organization of person signing the document	generic
Signing organization state	State of the organization of person signing document	generic
Signing organization state (abbreviated)	State abbreviation of the organization of the person signing the document	generic
Signing organization tax ID	Signing organization's tax ID	generic
Signing organization vendor #	Vendor number of signing organization	generic

Notary Variable Overview

Variable	Description	Type
DAN (Colorado clients)	Document authentication number	generic
Notary certificate number	Notary certificate number	generic
Notary county	Notary county	generic
Notary date	Notary date	date
Notary expiration date	Notary expiration date	date
Notary municipality	Notary municipality	generic
Notary name	Notary name	generic
Notary signature	Notary signature	generic
Notary state	Notary state	generic
State notary seal	Reserved space for official image placement upon notarization	generic

Custom Variable Overview

Variable	Description	Type
+ (Add New Document Variable)	<p>If the data dictionary does not include a variable you require for your document, you can add and define a custom variable. Click + (add) to manually create a new variable. Variable types include Text, Amount, and Checkbox.</p> <p>Text: Use custom text.</p> <p>Amount: Used for currency values. Amount values will include commas and displays numbers up to the second decimal point.</p> <p>Checkbox: Used for options. When a document uses a Checkbox variable, the signing user will see a check box they can select when signing the document.</p>	Text Amount
Allow subcontractors to add contractor affidavit option text	Will display if project setting is enabled; triggers alert on Manage Lien Waivers screen	Text
Disputed claims amount	Triggers alert on Manage Lien Waivers screen	amount
Disputed claims detail	Triggers alert on Manage Lien Waivers screen	text

Optional text	Will display if project setting is enabled, specifically 'Subcontractors may add lien waiver optional text'; triggers alert on Manage Lien Waivers screen	text
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Navigation Topics

Navigate to the Documents Page

From the **Tools** menu at the top of any page, select **Documents**. The **Documents** page will open in a new tab.

Note: Only users with Documents permissions will see this option in their **Tools** menu.

Frequently Asked Questions

Who can create and edit documents in Textura?

Users with appropriate permissions, such as Editors, can create and edit documents. Publication requires a Publisher role.

Enterprise and Local Administrators can assign the **Editor** or **Publisher** role to themselves or other users in their organization from the **Edit User** page.

What is a legacy document?

Legacy documents are those which were developed without using the Documents tool.

When previewing templates, why is my project drop-down list different than that of another Documents user at my organization?

The only projects users can preview are the same projects they have permission to access in Textura Payment Management. Permissions in Textura are unique to each individual organization user. Access to projects in Documents is determined by which permissions you were assigned on the **User Roles** and **Edit User** pages.

Why can I not see signatures on my previews?

Documents will pull document samples for previewing, but they are not physically signed documents. The preview will highlight the area on the template in yellow to represent where the signature would appear when someone signs the document.

What types of documents can I create?

At this time, the self-service tool supports the creation of Conditional and Unconditional Lien Waiver documents only.

Can I upload a document to the Editor?

No, you cannot upload a document to the Editor.

Can I create a document template for Lien Waiver Only Sub Tier organizations on my project?

The ability to create/edit a document template for Lien Waiver Only Sub-Tier (LW Sub) organizations is not supported as of the initial deployment of the Documents Editor feature but is currently in development.

What is the difference between Effective Date and Draw Period To Date?

The **Draw Period To Date** is the default date the General Contractor enters when initiating a draw. If a project uses the **Allow subcontractor to edit lien waiver effective date** project setting, the Subcontractor Signer can enter an alternative date when signing their lien waiver document. When applicable, the effective date displayed on the signed document will differ from that of the **Draw Period To Date**.

See *Lien Waiver Settings*

https://docs.oracle.com/cd/E97085_01/TPMhelp/en/North_America/10309559.htm for more information on project settings related to lien waiver documentation.

Can I define a calculation in a table?

It is not currently possible to configure a calculation in a lien waiver document template.

Can I log directly into the Documents Editor?

You must first log in to Textura to use the **Documents Editor** and then navigate to the **Document Library** from the **Tools** menu.