

## Textura Level Up Webinar

What's new with Textura in our Next Release

#### **Robert Garbacz**

Sr. Product Operations Manager Textura, Oracle CEGBU

**April 29, 2024** 

### **Safe harbor statement**

The following is intended to outline our general product direction. It is intended for information purposes only, and may not be incorporated into any contract. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions. The development, release, timing, and pricing of any features or functionality described for Oracle's products may change and remains at the sole discretion of Oracle Corporation.



## **Today's Agenda**

- 1. Intro
  - Helpful Links for Additional Training
  - Register for Release Communications
- 2. Previous Release Spotlight (April 7, 2024)
  - Contract Specific Documents
- 3. Release Changes in v24.5.0.0 (May 5, 2024)
  - Feature Enhancements
- 4. Coming Soon!
  - Indicate when payment holds exist for unsigned UCLW
- 5. Q&A



### **Additional Notes**



We will perform Q&A at the end of this presentation.



Questions should be limited to the releases and features discussed in this presentation.



More information about each change will be available through our release notifications, in Textura Help, and/or at mylearn.oracle.com. We also encourage you to post questions in this webinar.



## **Helpful Links for Additional Training**

- Recurring subcontractor and sub-tier webinars:
   <u>https://www.oracle.com/industries/construction</u>

   <u>-engineering/textura-training/</u>
- Oracle Guided Learning: https://mylearn.oracle.com/ou/search/textura
- Level Up Webinar Training PDFs:
  <a href="https://docs.oracle.com/cd/E97085\_01/1031448">https://docs.oracle.com/cd/E97085\_01/1031448</a>
  3.htm#t10314483

#### **Available Oracle Textura training**

**Getting started** 

#### **Getting Started with Oracle Textura Payment Management**

Training is offered weekly on Mondays, Wednesdays, and Fridays.

Register for Monday at 2 p.m. CT Register for Wednesday at 2 p.m. CT Register for Friday at 10 a.m. CT



### **Register for Release Communications**

https://info.cegbu.oraclecloud.com/textura-releasehighlights?id=&type=&emailname=TPM\_Release\_Highlights \_Sep\_22.09\_Email\_US1.html

- Be notified of monthly release changes in advance of each release
- Notifications typically go out on the Friday prior to each Sunday release
- We also send out quarterly roundup emails that summarize changes over the prior month



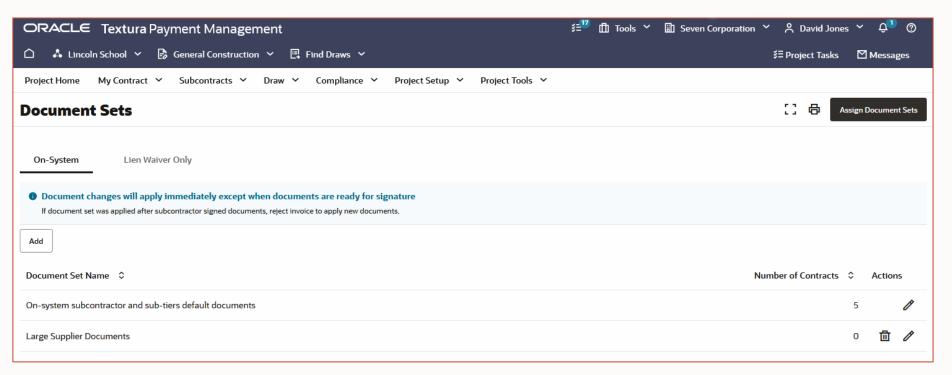


Previous Release Spotlight

### **Contract Specific Documents**

Contract Specific Documents is now available for Owners and General Contractors to assign unique billing documents for one or a group of contracts on their projects.

- Users with Create Projects permission can create and manage documents sets
- Use this page to view existing Documents Sets and to create new ones

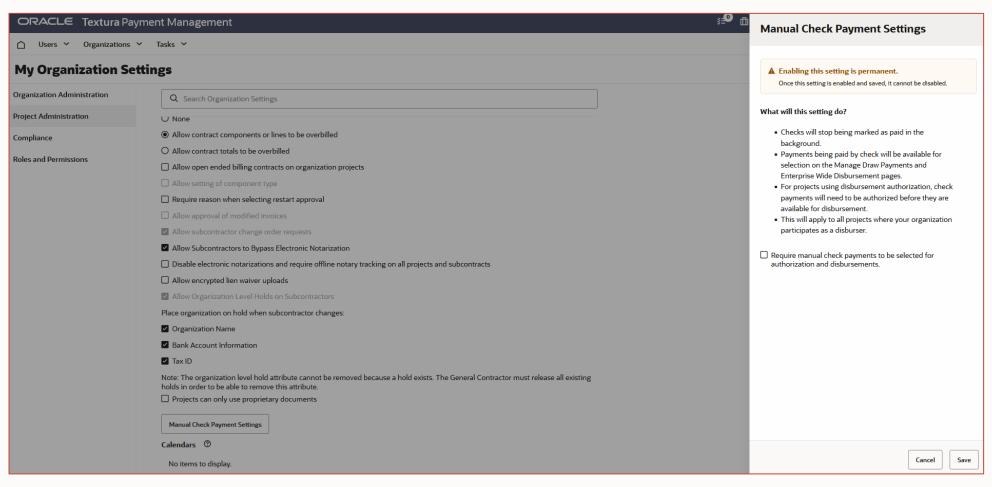




Release Changes in v24.5.0.0

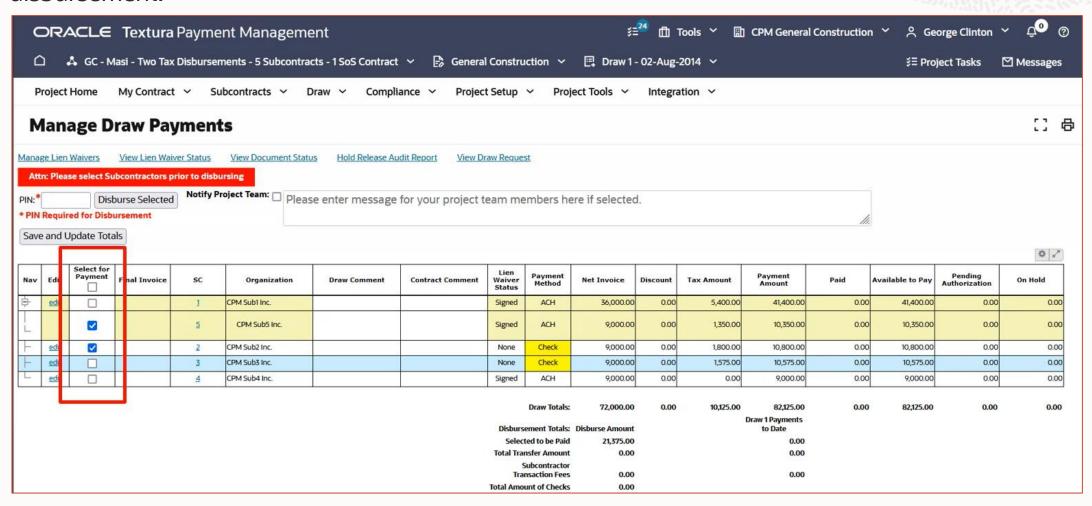
#### Disbursements - allow manual checks to be selected for disbursement

Disbursing organizations can now be configured to allow disbursement of manual checks. To enable, an enterprise or local admin will need to update your organization's settings.



### Disbursements – allow manual checks to be selected for disbursement

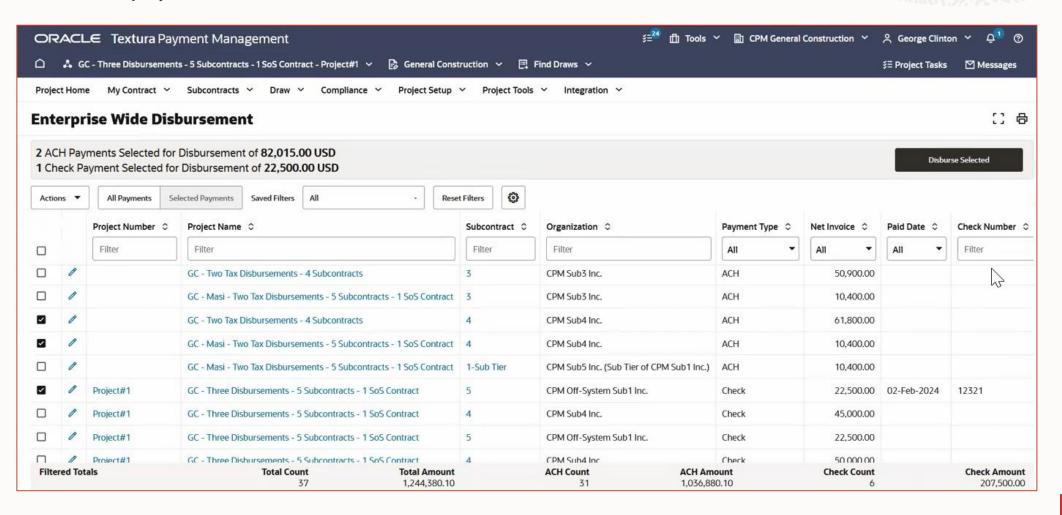
Disbursing users now have the ability to select invoices with the Payment Method of Check for disbursement.





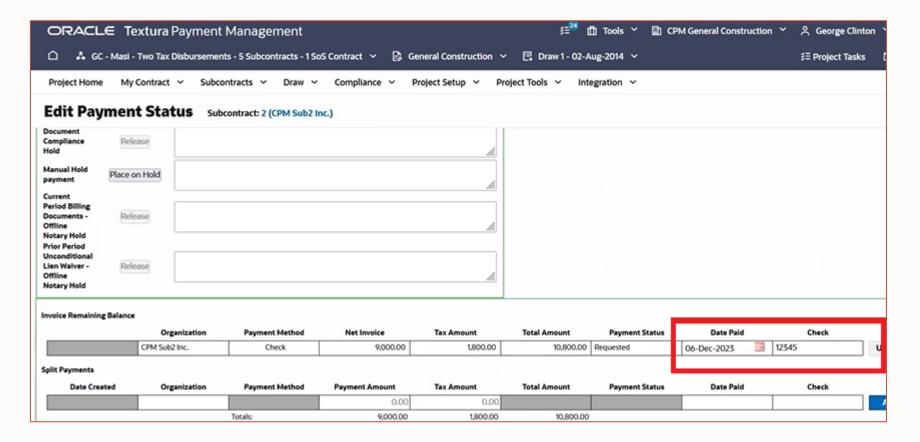
#### Disbursements – allow manual checks to be selected for disbursement

Organizations using Enterprise Wide Disbursement can view and edit paid date and check numbers for invoices with a payment method of Check.



#### Disbursements – allow manual checks to be selected for disbursement

Edit Payment Status can be used to input Date Paid and Check Number fields in Textura for invoices with a payment method of Check.



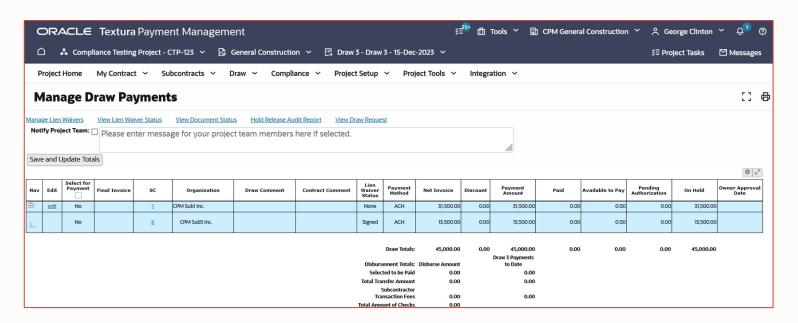


## Coming Soon

## Coming Soon: Indicate when payment holds exist for unsigned UCLW

Today, a missing / unsigned Unconditional Lien Waiver from a subcontractor blocks a General Contractor from releasing payment. In the UI the payment cannot be selected for Disbursement however there is no indication on why unless a user views the Lien Waiver status.

We are improving this behavior by showing the payment as On Hold throughout the application for missing Unconditional Lien Waiver. In example, if a Disbursing user is viewing the Manage Draw Payments screen, a Subcontractor with a missing UCLW will now appear On Hold.





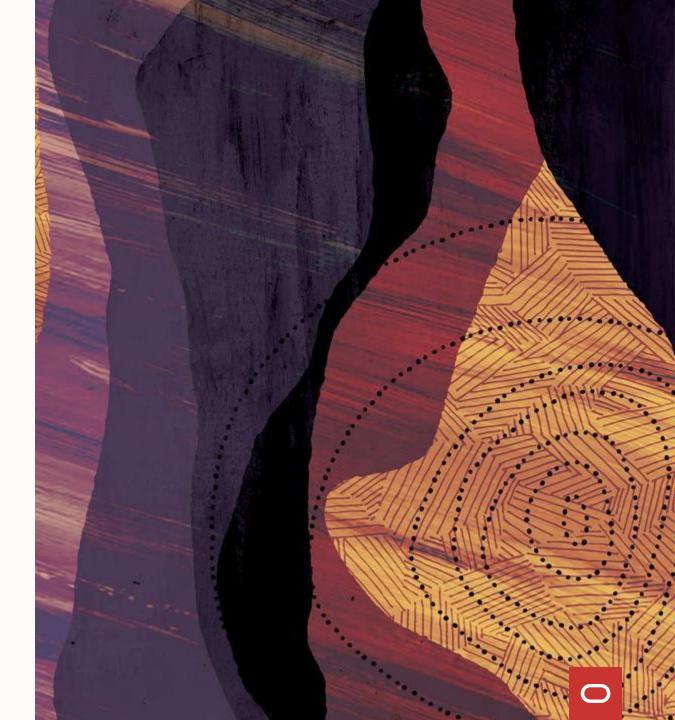
Q&A

# The next Level Up Webinar will be held on Monday, May 27th at 2 PM CDT.

Register here:

https://oracle.zoom.us/webinar/register/WN v LZyz2zcTBGlfpDZ1z4OdQ

## Thank you!



# ORACLE