



# Textura Level Up Webinar

What's new with Textura in our Next Release

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**Welcome, we'll get started shortly...**





# Textura Level Up Webinar

What's new with Textura in our Next Release

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# Safe harbor statement

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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
  - Security Best Practices
2. Previous Release Spotlight (March 9<sup>th</sup>, 2025)
3. Release Changes in v25.3.0.0 (April 6<sup>th</sup> 2025)
  - Feature Enhancements
    - DaaS & Textura – Bug Fixes
4. Coming soon!
  - Oracle Assistant for Textura – update
  - Learn About the Oracle Assistant for Textura – webinar scheduled for April 28<sup>th</sup>
5. Q & A
6. Post Webinar Survey

# Helpful Links for Additional Training

Recurring subcontractor and sub-tier webinars:

<https://www.oracle.com/industries/construction-engineering/textura-training/>

Oracle Guided Learning:

<https://mylearn.oracle.com/ou/search/textura>

Level Up Webinar Training PDFs:

[https://docs.oracle.com/cd/E97085\\_01/10314483.htm#t10314483](https://docs.oracle.com/cd/E97085_01/10314483.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

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

[https://info.cegbu.oraclecloud.com/textura-release-highlights?id=&type=&emailname=TPM\\_Release\\_Highlights\\_Sep\\_22.09\\_Email\\_US1.html](https://info.cegbu.oraclecloud.com/textura-release-highlights?id=&type=&emailname=TPM_Release_Highlights_Sep_22.09_Email_US1.html)



Subscribe to Release Highlights

Thank you for your interest in receiving the monthly 'Release Highlights' email.

This email outlines the main features in each Textura release and links to the 'Release Notes' article for full details. We also send a quarterly 'Round Up' of the most important new features.

To subscribe, enter your email address below and click the 'Submit' button.

Email Address\*

First Name\*

Last Name\*

# Security Best Practices



- Do not share your Oracle Textura Payment Management username or password with others.
- Enable a verification phone number to better protect your account from unauthorized password changes. Additionally, having a verification phone number will provide the ability to retrieve your username.
- Oracle Support will never ask you for a verification code sent to your phone.
- Designate two Enterprise Administrators for your organization.



# Previous Release Spotlight

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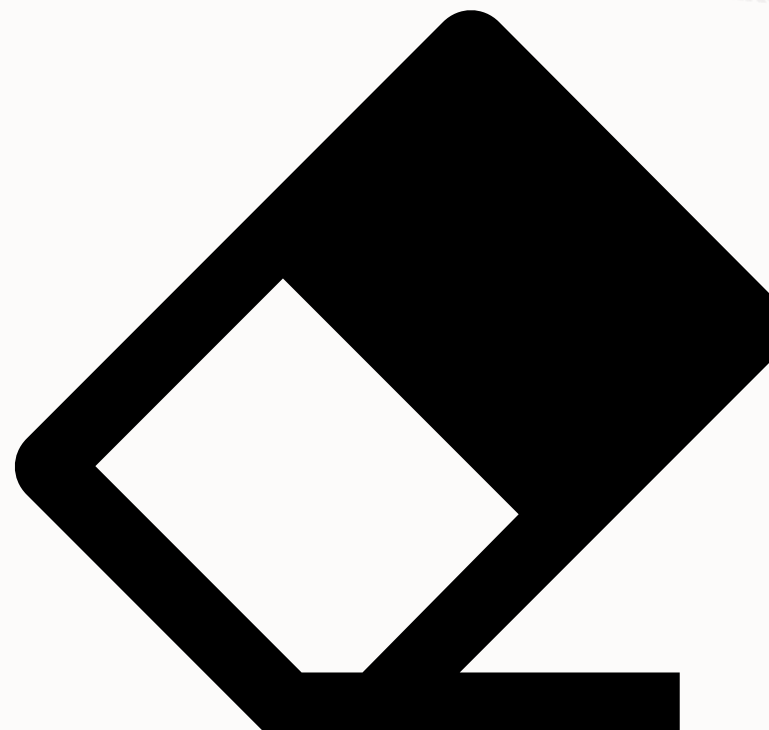
# Data-as-a-Service – tracking deletions improvements

The **Payment** graph in Data-as-a-Service now includes support for tracking deletions.

- New isDeleted filter added
- New isDeleted Boolean field added
- dataModifiedBegin and dateModifiedEnd filters represent the date a record is deleted.

The **Contract** graph now includes support for tracking deletions of incomplete or unaccepted contracts.

The **Organization Hold** graph now includes filters for dataModified.



# Release Changes in v25.4.0.0

*Available April 6, 2025*

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# Summary of Changes

- The **Track Negative Invoices** project setting will now place submitted positive invoices On Hold to allow for payment adjustments.
- **DocWriter**'s user experience has been improved with smart search functionality and added context to assist PDF sample generations.
- A new **Invoice Line** sub graph is available in Textura Data as a Service (DaaS). **Manual Contract** and **Lien Waiver** graphs now include support for tracking deletions.
- Misc. Bug fixes



# Tracking Negative Invoices – prevent overpayment

Payment Holds will now apply not only to the negative invoice itself but also to all positive unpaid invoices for the specific contract.

The screenshot displays the Oracle Textura Payment Management web application. The top navigation bar includes the Oracle logo, project name 'GC - Masi', and various tool and notification icons. The main menu on the left lists categories like 'Project Home', 'My Contract', 'Subcontracts', 'Draw', 'Compliance', 'Project Setup', 'Project Tools', and 'Integration'. The 'Project Settings' page is active, with a sidebar on the left containing options such as 'General Information', 'Project Information', 'Date Tracking', 'Subcontracts', 'Draw', 'Integration', 'Retention', 'Payment Holds' (highlighted), 'Documents', 'Lien Waiver', 'Site Information', and 'General Contractor Information'. The main content area shows a search bar and a list of settings. Under the 'Invoice' section, the checkbox 'Track negative invoices and apply contract-wide payment holds' is checked. A tooltip titled 'Track negative invoices' provides details: 'Hold will be placed on all subcontractor invoices in a contract when a negative invoice is tracked after the setting is enabled. Existing negative invoices will not trigger holds.' Other settings include 'Track overbilled contracts', 'Track invoices with stored materials', 'Track split payments', 'Lien Waiver' (with a 'Prior Period' setting), and 'Current Period' (with a setting for missing current period sub-tier lien waivers). The 'Documents' section is also visible at the bottom.



# Tracking Negative Invoices – prevent overpayment

Holds must be manually released:

- Individual holds can be released one at a time from the positive invoices.
- Alternatively, all holds can be released simultaneously when the hold on the negative invoice is removed.

ORACLE Textura Payment Management

GC - Three Disbursements - 5 Subcontracts - 1 SoS Contract - Project#1

General Construction

Find Draws

George Clinton

Project Tasks

Messages

Project Home

My Contract

Subcontracts

Draw

Compliance

Project Setup

Project Tools

Integration

Contract Status

Subcontract: 1 (CPM Sub1 Inc.)

Links

Project

GC - Three Disbursements - 5 Subcontracts - 1 SoS Coi

Contract (Organization)

1 (CPM Sub1 Inc.)

Reallocating for Draw 5

Contract Amount

Original0.00

Change Orders125,000.00

Adjusted125,000.00

Approved Invoices

Gross32,500.00

Retention Held637.50

Net31,862.50

Payments

Latest DateNo Payments Yet

Current Payment19,487.50

Total Payments7,425.00

Items Not Exported

Approved Invoices26,912.50

Payments7,425.00

Pending Invoices

Draw	Status	Comments	Period To Date	Method	% Complete	Gross Invoice	Retention	Net Invoice	Pending Payment	Total Pending	Payment Due Date	Attachments	Actions
2	Held	Negative Invoice Hold	30-Sep-2012	ACH	20.90%	12,375.00	(137.50)	12,512.50	12,512.50	12,512.50		0	<div><div></div><div>...</div></div>
3 - Draw#3 Name	Held	Negative Invoice Hold	31-Oct-2012	ACH	30.00%	11,375.00	(100.00)	11,475.00	11,475.00	23,987.50		0	<div><div></div><div>...</div></div>
4 - Draw 4	Held	Negative Invoice Hold	28-Feb-2025	Manual	26.00%	(5,000.00)	(500.00)	(4,500.00)	(4,500.00)	19,487.50		0	<div><div></div><div>...</div></div>

Payments



# DocWriter – improved user experience

Textura DocWriter

RW

Document Library

View Previews

Q Signature Types (2) X Search

Organization Types (3) Document Types (3) Document Availability (3) Signature Types (3) More Filters

5 items Duplicate Create Preview View Properties

Documentation Authentication Number  
State Seal

Document Name ↕	Status ↕	Type ↕	Created On ↕	Created By ↕	ID ↕
Affadavit and Conditional LW_01132021	Draft	Lien Waiver	01-Jan-2021	Textura Administrator	101
Affadavit and Unconditional LW_03012021	Published	Lien Waiver	01-Jan-2021	Textura Administrator	102
Marple District Sworn Stmt_12192021	Published	Sworn Statement	01-Jan-2021	Textura Administrator	103
CPM Invoice Template_01122021	Rejected	Invoice	01-Jan-2021	George Clinton	104
General LW Template_04132021	In Review	Conditional Lien Waiver	01-Jan-2021	George Clinton	105





# DocWriter – improved user experience

Textura DocWriter

Document Library

Search

Organization Types (3)

Document Types (3)

Document Availability (3)

Signature Types (3)

More Filters

5 items

Create Preview

View Properties

View Projects

Document Name	Status	Type
Affadavit and Conditional LW_01132021	Draft	Unconditional Lien Waiver
Affadavit and Unconditional LW_03012021	Published	Conditional Lien Waiver
Marple District Sworn Stmt_12192021	Published	Sworn Statement
CPM Invoice Template_01122021	Rejected	Invoice
General LW Template_04132021	In Review	Conditional Lien Waiver

Affadavit and Unconditional LW\_03012021

Organization Name

Generic Organization

Project

Hotel VIP

Contract

Electric Company

Draw

1

Options

☐ Final

☐ Notarization

☐ Highlight signatures

Create

Create and Create Another

Cancel

Actions



# DocWriter – improved user experience

Textura DocWriter

gc

Document Library

Previews

Status ▾	Document ▾	Project ▾	Contract ▾	Draw ▾	Final ▾	Notarization ▾
Ready	Skiles Group Subcontractor Pay Application	Facebook1	CPM General Construction   ...	1		✓
Ready	Skiles Group Subcontractor Pay Application	Facebook1	CPM General Construction   ...	1	✓	
Ready	Skiles Group Subcontractor Pay Application	Facebook1	CPM General Construction   ...	1		
Ready	JPMC Chicago Lien Waiver	Facebook1	CPM General Construction   ...	1		



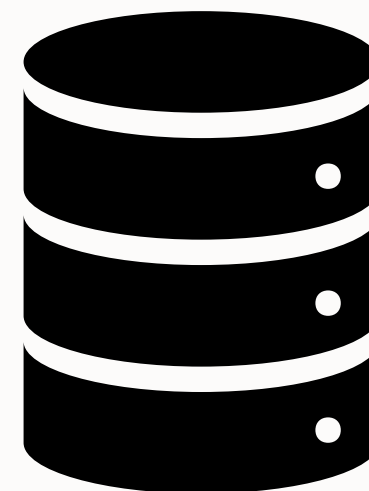


# Data-as-a-Service – Invoice Line sub graph

An **Invoice Line** sub graph is now available to track each invoice line within an invoice.

This includes:

- Work This Period, Materials Stored This Period, Retention Amount This Period, Retention Release This Period
- Phase codes, phase code descriptions
- Invoice codes, invoice code descriptions
- .....**AND MORE!**



# Data-as-a-Service – tracking deletion

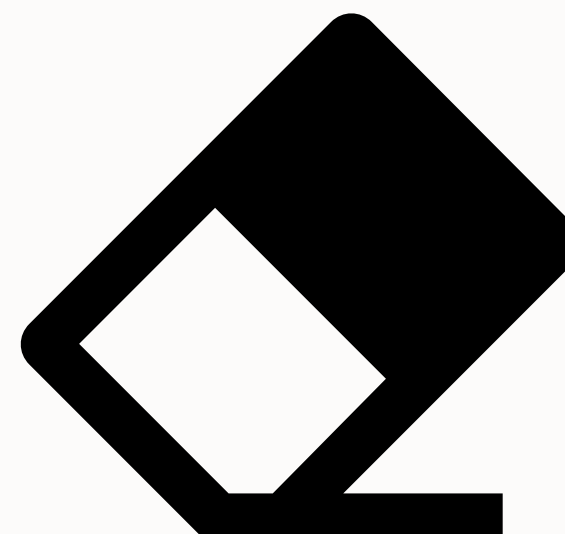
The **Manual Contractor** and **Lien Waiver** graphs now include support for tracking deletion.

## New filter:

- isDeleted

## New field:

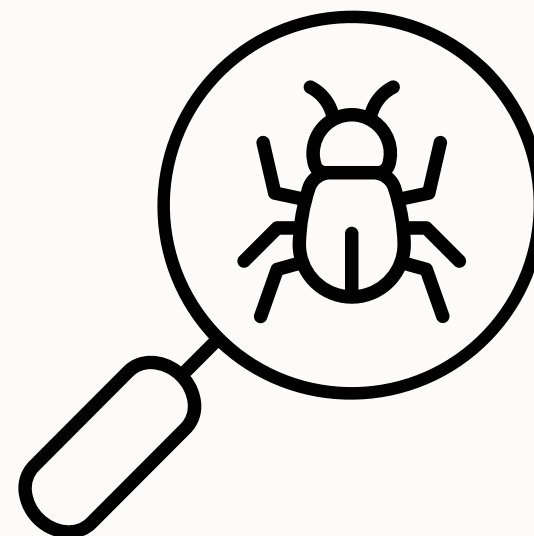
- isDeleted



# Data-as-a-Service – misc bugs addressed

Bugs addressed:

- Contract value input via Record Sub-Tiers not persisted in Manual Contract graph
- Slow response for Contract query when filtered by dateModifiedBegin
- One invoice record is now returned for invoices that are exported to ERP multiple times
- Disbursable graph with Payment Holds subgraph failing to return records



# Textura - Bug Fixes

The following bug fixes are resolved with this release:

- Resolved error when closing Draw where integration package doesn't export rejections.
- Resolved an issue with deleting draw.
- Resolved an issue where the Security Banner provided the wrong best practices link.
- Various other minor bugs



# Oracle Assistant for Textura Update

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# Oracle Assistant for Textura

## Rolling out to existing subcontractors

ORACLE

Textura Payment Management

Tools

CPM Sub1 Inc.

Stan Martin

Users

Organizations

Tasks

Home

Recently Viewed Projects

Compliance Testing Project CTP-123

Clean Project CP-99

GC - Multi-Components Project

6189-1

Project List

Saved Filters

Active Projects

Reset Filters

Project Name	Project Number	General Contractor	My Tasks	Status
Filter	Filter	Filter		Active
29700878	p-29700878	lwgc3	1	Active
6189-1		CPM General Construction	3	Active
9793190P	p-9793190P	9793190gc	0	Active
All Project Participants on System		CPM General Construction	1	Active
CAMS	69136913	Hidden Valley General Contracting Company	0	Active
CAMS Full and Final Docpare	69136913	Hidden Valley G	X	Active
Clean Project	CP-99	CPM General Co		Active
Compliance Testing Project		CPM General Co		Active
DocMare	SoS internal 5555	Hidden Valley G		Active
Facebook1	FB1	CPM General Co		Active
GC - Authorization		CPM General Co		Active

Introducing our new Textura assistant! As an early access user, you can rely on it for support questions anytime. If needed, you can also reach out to a live agent.

Ask about usage fees, notarization, invoice modifications, and more.

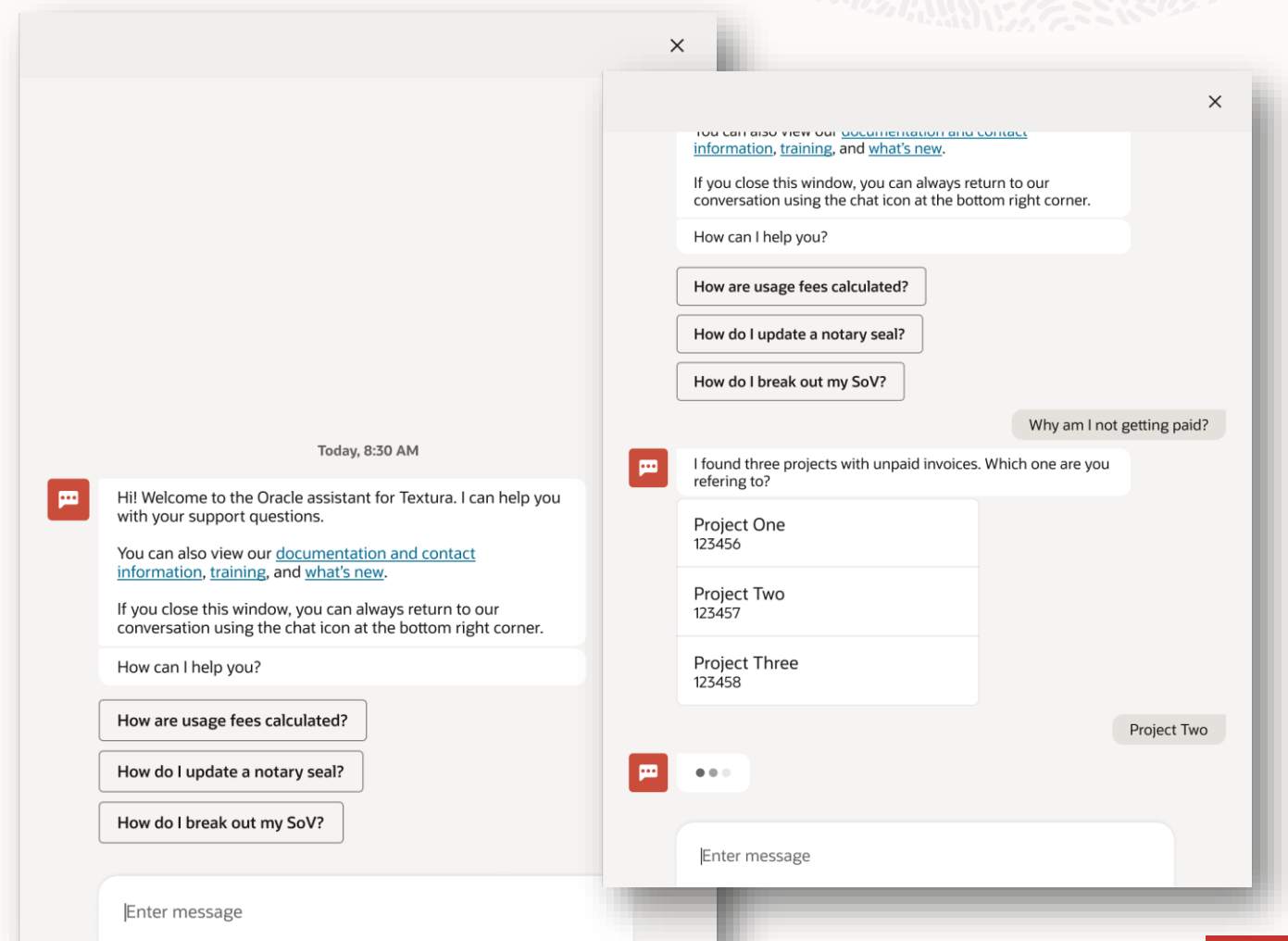
Try it out and share your feedback!

Done



# Oracle Assistant for Textura Capabilities

- Only for subcontractors
- No queue wait time
- Easily answers “how-to” questions
- Contextual understanding of payment status and electronic notary settings
- Quickly connect to live agents, when needed
- Access all Textura support resources







## Want access now?

Tell us in the survey after this meeting! Please provide your name, organization name, organization ID, and email.

*Access will be enabled organization-wide.*





How Can AI Transform your Textura Experience?

# Save the Date

**Learn About the Oracle Assistant for Textura**

April 28, 2025

Immediately following LevelUp!

# Q&A



**The next Level Up Webinar will be held on  
Monday, April 28<sup>th</sup> at 2 PM CDT.**

Register here:

[https://oracle.zoom.us/webinar/register/WN\\_vLZyz2zcTBGIfpDZ1z4OdQ](https://oracle.zoom.us/webinar/register/WN_vLZyz2zcTBGIfpDZ1z4OdQ)

**Thank you!**

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ORACLE