

ORACLE

Textura Level Up Webinar

What's new with Textura in our Next Release

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Safe harbor statement

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Today's Agenda

1. Intro
 - Helpful Links for Additional Training
 - Register for Release Communications
2. Release Changes in v24.3.0.0 (**March 10, 2024**)
 - Feature Enhancements
3. Coming Soon!
4. Call for Research - existing page usability review and design testing
 - Add Sub-Tiers
 - View Lien Waiver Status
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:
<https://www.oracle.com/industries/construction-engineering/textura-training/>
- Oracle Guided Learning:
<https://mylearn.oracle.com/ou/search/textura>



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-release-highlights?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



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Engineering



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*

Release Changes in v24.3.0.0

Summary of Changes

- A new Textura Payment Accelerator (TPA) dashboard is now available for General Contractors at the project level.
- TPA cutoff functionality has been enhanced with simplified project configuration and improved system messaging.
- A new project setting configuration is now available to disable automatic inclusion of sub-tiers in draws.
- Diversity values can now be tracked by Architects, Supervisory Orgs, Title Companies, Funds Disburser, Interfaces Consolidated Org, and Notice of Lending Organizations.



Textura Payment Accelerator dashboard – project level

General Contractors can now view a new project level TPA dashboard to quickly access TPA invoices.

- Access to Project specific dashboard via Project Tools menu
- Available for all roles on the project
- Team can quickly view TPA invoices & take necessary action

ORACLE Textura Payment Management

Springfield Police Department | General Construction | Find Draws

Project Home | My Contract | Subcontracts | Draw | Compliance | Project Setup | Project Tools

TPA Dashboard

Funding Nearing Cutoff Warning
30,129.81
Within 5 days

Vendor Name	Contract Number	Draw	Invoice Status	Payment Amount	Funding Amount	Cutoff Date	Extension Status	Edit
Green Corp	001	1	Held	11,610.00	11,464.87	10-Feb-2024	Available	
Vision Corporation	004	1	Held	10,822.27	10,686.99	10-Feb-2024	Declined	
Spruce Street Contracting	003	1	Held	8,078.94	7,977.95	13-Feb-2024	Accepted	
Total: 3					30,129.81			

Project Tools

- Print Draw Documents
- Generate Document Archive
- View Document Archives
- Audit Reports
- Draw Reports
- TPA Dashboard



Textura Payment Accelerator cutoff improvements

Project Settings configurations have been simplified to help project teams quickly identify the cutoff settings applied to their project.

- New setting to select for Funding Cutoff override
- Existing settings now displayed horizontally across the screen

Project Settings

General Information

Project Information

Date Tracking

Subcontracts

Draw

Q Search project settings

Funding Cutoff

Override TPA funding cutoff program settings

Funding Cutoff Base Date
Invoice Approval Date

Base Date Offset (Days)
5

Subcontractor Cutoff Extension (Days)
3

Textura Payment Accelerator cutoff improvements (continued)

The screenshot displays the Oracle Textura Payment Management web application. The top navigation bar includes the Oracle logo, user name 'David Jones', and notification icons. The main content area shows a 'View Specific Message' for 'David Jones' with the following details:

From: Textura
To: David Jones
Date: Thursday, 22-Feb-2024 11:19:09 AM
Project: Lincoln School
Subject: [Textura System] Lincoln School - Seven Corporation Early Payment Program Payments Nearing Funding Cutoff Date
Message: To the Project Manager(s) of Lincoln School:

The following payments are nearing their Seven Corporation Early Payment Program Disbursement cutoff date. Payments not initiated by their cutoff date *will not be accelerated and will be paid in accordance with the payment terms of the subcontract.*

Cutoff Date	Draw	Sub Contract	Subcontractor Name	Payment Amount	Invoice Status
27-Feb-2024	2	001	Green Corp	212540.85	Approved (Standard Approval)
27-Feb-2024	2	003	Spruce Street Contracting	1372574.25	Approved (Standard Approval)
27-Feb-2024	2	002	Blue Semiconductor	651851.32	Approved (Standard Approval)

You can visit the [TPA Dashboard](#) for this project to review and address payments nearing funding cutoff.

Kind Regards,
Textura Payment Management System
Customer Support: 866-TEXTURA (866-839-8872) | Hours: M-F 7am-8pm CT

Notification: PA509 is an automatically generated message from the Textura System. DO NOT reply to this message.

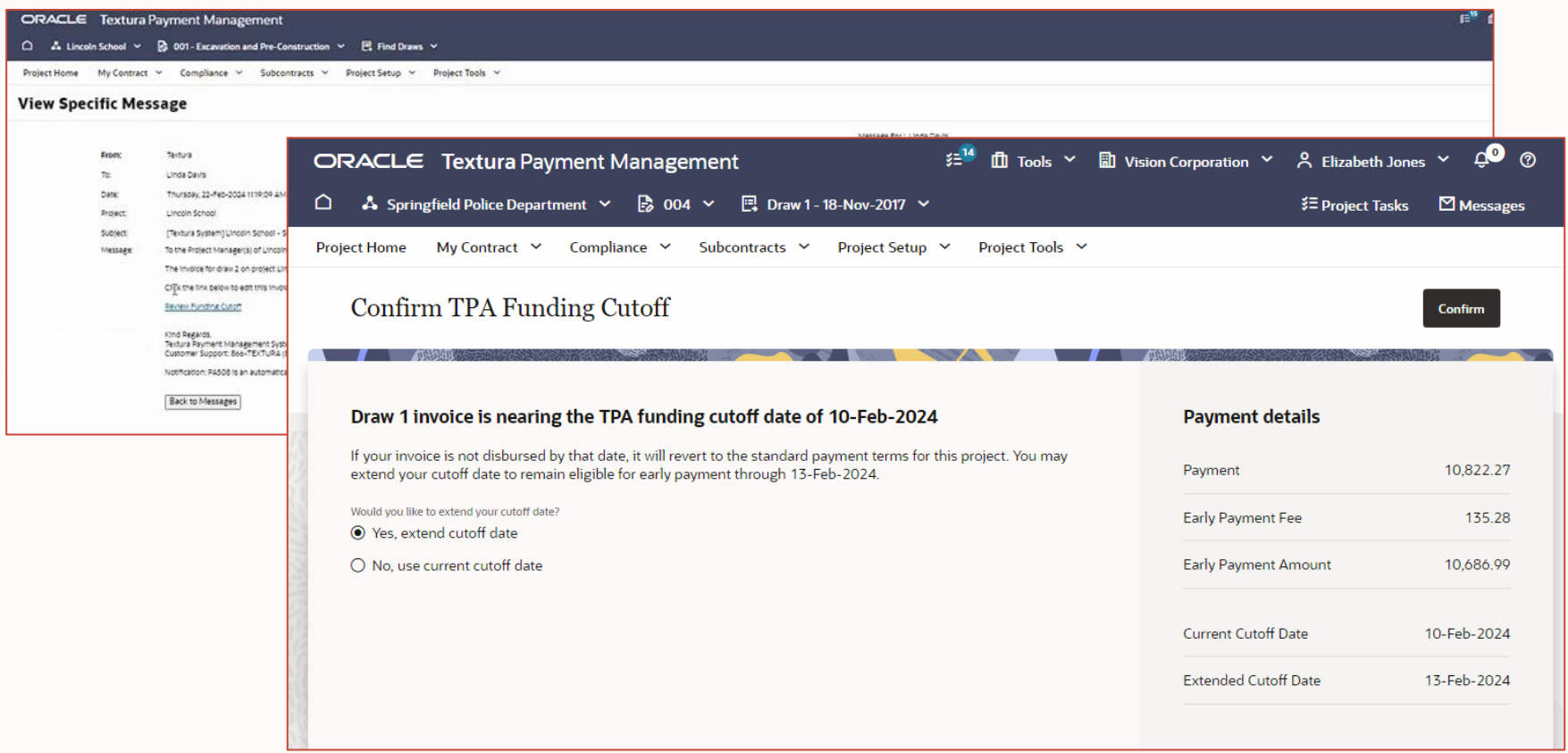
The **TPA nearing Funding Cutoff Date** system message has been enhanced with the following changes:

- All users with a role on a project will now receive system message
- Complete listing of all invoices nearing cutoff for specified project
- Navigation link to new project level TPA dashboard



Textura Payment Accelerator cutoff improvements – for Subcontractors

- Improved TPA funding nearing cutoff date system message
- TPA cutoff extension page has been updated with our latest styling



Configurable project setting to include sub-tiers in draws

A new project setting is now available to configure the inclusion of lien waiver only and manual sub-tiers in draws.

- Default = Enabled
- When enabled, lien waiver only and manual sub-tiers are automatically included in draw when their parent is included at draw initiation.

Project Settings

General Information

Project Information

Date Tracking

Subcontracts

Draw

Integration

Retention

Payment Holds

Documents

Search project settings

Draw

- Publish draw schedule to owner
- Publish draw schedule to subcontractors
- Disable general contractor's ability to reopen draws after owner approval
- Notify subcontractor upon invoice approval
- Allow invoice rejection reasons and SOV modification responses
- Require serial approval signatures on invoice
- Enter new invoices as whole dollars
- Enable disbursement authorization for subcontractor payments
- Include all lien waiver only and manual sub-tiers in draw when their on-system parent is included at draw initiation

Conditional Lien Waiver

Included in Draw ⓘ

On-system subcontractors and sub-tiers invited to a draw are identified by a read-only checkbox. Any lien waiver only and manual sub-tiers of these organizations are automatically included or excluded based on project settings.

	0.00	<input type="checkbox"/>	Manual	ⓘ
	0.00	<input type="checkbox"/>	None	ⓘ
	0.00	<input checked="" type="checkbox"/>	n/a	Upload ⓘ
	0.00	<input type="checkbox"/>	None	ⓘ
	0.00	<input type="checkbox"/>	None	ⓘ
	0.00	<input type="checkbox"/>	None	ⓘ
	0.00	<input checked="" type="checkbox"/>	Upload	ⓘ
	0.00	<input checked="" type="checkbox"/>	Upload	ⓘ

CPM Sub2 Inc.	2	On-Sys	
CPM Sub5 Inc.	3	On-Sys	
CPM Architect		LW Sub	Tier1 LWOST
CPM Supervisory Organization		LW Sub	Tier2 LWOST



Supplier Diversity Tracking Values

Diversity values can now be tracked by Architects, Supervisory Orgs, Title Companies, Funds Disburser, Interfaces Consolidated Org, and Notice Lending Organizations.

My Organization Profile

General Information

Banking Information

Search Organization Profile

General Information

Customer Number: 295

Company Name
Mike's Electrical

Address Line 1
111 West Monroe Street

Address Line 2

City
Phoenix

State
Arizona

Zip Code
85005

Country
United States

Primary Phone Number
8743232292

Alternative Phone Number
8743232295

Federal Employer Identification Number (FEIN)
12-3456789

Country Of Operations
United States

Please input your Federal Employer Identification Number (FEIN) as a nine-digit number (12-3456789) formatted as shown with a dash. Do not input a Social Security number as this data may be used to search for your organization or print or documents.

This is the country where work will be performed. This field determines Bank Country.

Default Translation
English-US

Organization Role
Architect

Organization Type
Corporation

Supplier Diversity Tracking Values

1 supplier tracking value selected.

Manage Values

Supplier Tracking

Please report the organization's diversity values, if any.

Standard Diversity Values
Certification required on all standard values.

- AABE (African American Business Enterprise)
- ABE (Asian American Business Enterprise)
- AVMBE (Aboriginal & Visible Minority)
- DBE (Disadvantaged Business Enterprise)
- DVBE (Disabled Veteran Business Enterprise)
- EDGE (Encouraging Diversity Growth and Equity)
- HBE (Hispanic American Business Enterprise)
- HUB (Historically Underutilized Business)
- HUBZone (Historically Underutilized Business Zone)
- LBE (Locally Based Enterprise)
- LGBTQ (Lesbian, Gay, Bisexual, Transgender, Queer Enterprise)
- MBE (Minority Owned Business Enterprise)
- NABE (Native American Business Enterprise)
- NHO (Native Hawaiian Organization)
- SBE (Small Business Enterprise)
- VBE (Veteran Business Enterprise)
- WBE (Woman Owned Business Enterprise)
- Do not qualify for any standard values



Coming Soon

Coming Soon: Contract Specific Documents

Contract Specific Documents will provide the ability for Owners and General Contractors who control documents to customize billing documents for one or a group of contracts on their projects.

The image displays two overlapping screenshots of the Oracle Textura Payment Management web application. The top screenshot shows the 'Document Sets' page, which includes a navigation menu, a search bar, and a list of document sets. The bottom screenshot shows the 'Assign Document Sets' page, which features a search bar and a table of organizations with columns for Organization Name, Organization Type, Contract Number, Vendor ID, Description, and Assigned Document Set.

Organization Name	Organization Type	Contract Number	Vendor ID	Description	Assigned Document Set
CPM Off-System Sub1 Inc.	On System	5			On-system subcontractor and sub-tiers default...
CPM Sub1 Inc.	On System	1	v-sb1		On-system subcontractor and sub-tiers default...
CPM Owner	Lien Waiver Only			55	Lien-waiver only sub-tier default documents
CPM Sub5 Inc.	On System	6			On-system subcontractor and sub-tiers default...
CPM Sub2 Inc.	On System	2	v-sb2		On-system subcontractor and sub-tiers default...
CPM Sub3 Inc.	On System	3	v-sb3		On-system subcontractor and sub-tiers default...
CPM Architect	Lien Waiver Only			Tier1 LWOST	Lien-waiver only sub-tier default documents
CPM Supervisory Organization	Lien Waiver Only			Tier2 LWOST	Lien-waiver only sub-tier default documents
CPM Sub4 Inc.	On System	4	v-sb4		On-system subcontractor and sub-tiers default...
Manual Contractor Tier1	Lien Waiver Only			Tier1	Lien-waiver only sub-tier default documents
Manual Contractor Tier2	Lien Waiver Only			Tier2	Lien-waiver only sub-tier default documents



Existing page usability review and design testing

Who?

Daily or weekly users of the **Add Sub-Tiers** or **View Lien Waiver Status** pages

Details

- When: March – April
- Time commitment: 2 sessions
 - 30 minutes to 1 hour
- Confidentiality agreement required

Subcontractor or Supplier	Subcontract or Purchase (PO) Number	Service	Notice Date	Notice Amount	Notice	Joint Check	Draw 1	Draw 2	Draw 3	Final
							Period To 31-Jul-2014	Period To 31-Jul-2014	Period To 31-Aug-2023	
CPM Sub1 Inc.	1					No	progress	progress	not rcvd	
CPM Sub5 Inc.	5					No	progress	progress	not rcvd	
CPM Sub2 Inc.	2									
CPM Sub3 Inc.	3									
CPM Sub4 Inc.	4									

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GC - Three Disbursements - 5 Subcontracts - 1505 Contract - Project#1

Project Home My Contract Subcontracts Draw Compliance Project Setup Project Tools Integration

Add Sub-Tier

Subcontract Of: CPM Sub1 Inc.

Name:

Location: [Organization is not on Textura system]

Contract Number:

Service:

Notice Date:

Notice Amount: 0 No file chosen


Due On Site:

Joint Check: No

Organization Type: Manual Contractor

Contract Amount: 0

Tax ID:

 **How to sign up**

- Email dan.madigan@oracle.com



Q&A

**The next Level Up Webinar will be held on
Monday, March 25th at 2 PM CDT.**

Register here:

https://oracle.zoom.us/webinar/register/WN_vLZyz2zcTBGIfpDZ1z4OdQ

Thank you!

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