

ORACLE

Textura Level Up Webinar

What's new with Textura in our Next Release

Robert Garbacz

Sr. Product Operations Manager

Textura, Oracle CEGBU

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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. Release Changes in v24.2.0.0 (**February 9, 2024**)
 - Feature Enhancements
 - Key Bugs Resolved
3. Call for Research - existing page usability review and design testing
4. 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 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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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 v24.2.0.0

Summary of Changes



- General Contractors can now configure subcontracts to **allow contract overbilling**.
- The parent organization name is now displayed for all contracts on the Supplier Qualifications tab within **Supplier Tracking**.
- Enhanced **Record Sub-Tiers** tracking and workflow.
 - Parent organizations enter budget and payment for children.
 - Subcontractors are now required to acknowledge when no suppliers are added to a project on Record Sub-Tiers.
- TPA Declined Enrollment Report has been enhanced and renamed to **TPA Enrollment Audit Report**.
- Enhanced user experience for Subcontractor usage fee retry process.
- Key Bugs Fixed in 24.2.0.0

Subcontracts – allow contract overbilling

Contracts can now be set to allow overbilling. When enabled, invoices submitted can exceed the contract's current value.

Available controls include:

- Organization Setting
- Project Setting
- Contract Setting

The screenshot shows the Oracle Textura Payment Management interface for creating a subcontract. The page title is "ORACLE Textura Payment Management". The breadcrumb trail is: "TPA scheduled disbursement project - 123" > "123 - General Construction" > "Find Draws". The main navigation bar includes: "Project Home", "My Contract", "Subcontracts", "Draw", "Compliance", "Project Setup", and "Project Tools". The sub-header is "Create Subcontract" with "Cancel" and "Save" buttons. The form is divided into three sections: "Organization" with a "Select Organization" button; "Contract Information" with fields for "Contract Number" (marked "Required"), "Vendor ID", "Contract Date" (set to "17-Jan-2024"), and "Default Payment Form" (set to "ACH"); and "Contract Settings" which includes "Contract Options" (checkboxes for "Open Book", "Specify Billing", "Display Units"), "SOV Option" (radio buttons for "Specified SOV", "Review SOV", and "None" which is selected), and "Allow Overbilling" (checkbox "Allow contract to be overbilled" which is checked). A "Comment" field is at the bottom.



Supplier Tracking – parent organization name

The screenshot shows the Oracle Textura Payment Management interface. The main heading is "Supplier Tracking". Below it, there is a search bar and a filter menu with options: "All", "Approval Required", and "Pending Submission". The table below lists five suppliers with their parent organizations. The parent organization names are "CPM General Construction" for the first four and "CPM Sub1 Inc. (1)" for the last one.

Organization	Parent Organization	Approved Values	Earliest Expiration Date	Actions
CPM Sub1 Inc.	CPM General Construction	Approval Required	19-Jan-2024	Review
CPM Sub2 Inc.	CPM General Construction	Approval Required	13-Jan-2024	Review
CPM Sub3 Inc.	CPM General Construction	Approval Required	27-Jan-2024	Review
CPM Sub4 Inc.	CPM General Construction	Pending Submission		Edit
CPM Sub5 Inc.	CPM Sub1 Inc. (1)	Approval Required	19-Jan-2024	Review

The parent organization name is now displayed for all contracts on the Supplier Qualifications tab within **Supplier Tracking**.

- Sub-Tiers parent organization name will include the parent’s Contract Number in parenthesis.



Record Sub-Tiers – enhanced tracking and workflow

New workflow

1. Parent enters Record Sub-Tiers (budget and values) for children.
2. Child can Record Sub-Tiers for their children after Parent completes their input.
 1. NOTE: Child cannot modify parent entered values.

The screenshot displays the 'Record Sub-Tiers' workflow interface. At the top, there is a navigation bar with project details: 'Clean Project - CP-99', '12345 - Landscaping', and 'Draw 1 - 1 - 10-Dec-2023'. Below this, a progress bar shows three steps: 'Progress' (completed), '2 Record Sub-Tiers' (current), and '3 Review'. The 'Net This Period 5,625.00' is displayed on the right. The main title 'Record Sub-Tiers' is followed by 'Go To Draw Home', 'Previous', and 'Save & Continue' buttons.

Line Del	Organization				Service	Contract Amount	Previously Paid	Current Payment	Balance Due
	Name	Status	Location	Minority Status					
	CPM Sub1 Inc.	Self	Phoenix, Arizona	None	Landscaping	25,000.00	0.00	5,625.00	19,375.00
<input type="checkbox"/>	CPM Sub2 Inc.	LW Sub	Bos, Massachusetts	None	Some of the things	0.00	0.00	0.00	0.00
Subcontractors (On-system) Total:						0.00	0.00	0.00	0.00
Affidavit Lines Total:						0.00	0.00	0.00	0.00
Contracted Total:						0.00	0.00	0.00	0.00
Contracted as Percentage of Total:						0.00%	0.00%	0.00%	0.00%
Overall Total:						25,000.00	0.00	5,625.00	19,375.00

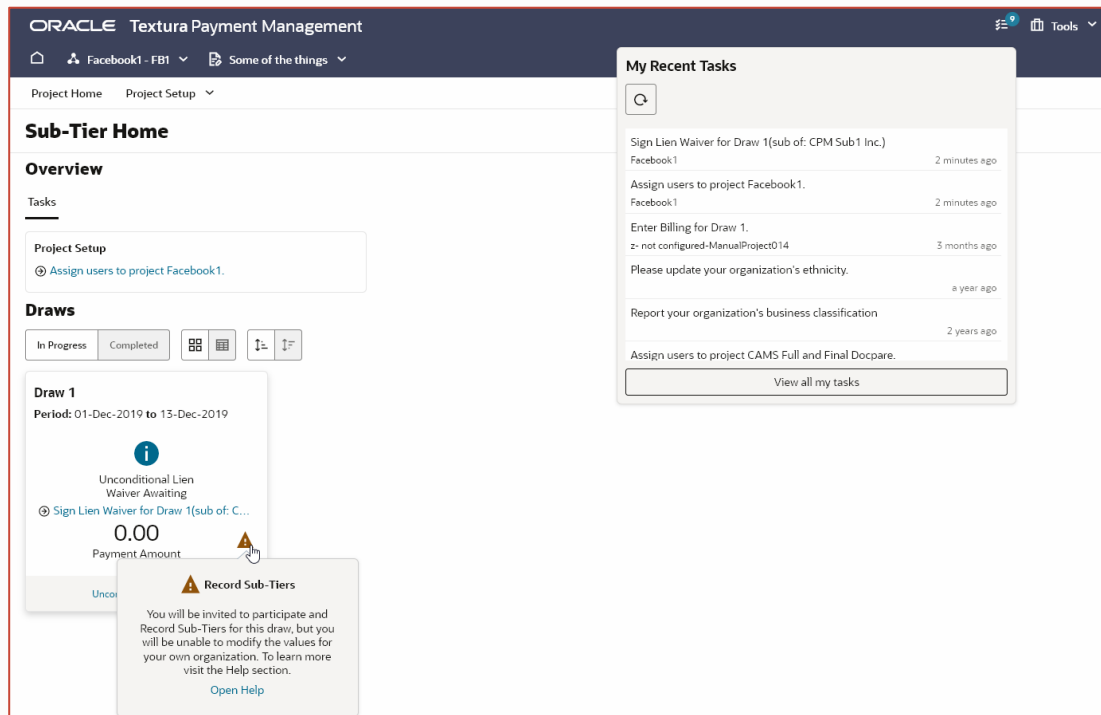
An 'Add New Sub Tier' button is located at the bottom center of the interface.



Record Sub-Tiers – enhanced tracking and workflow

Sub-Tier experience

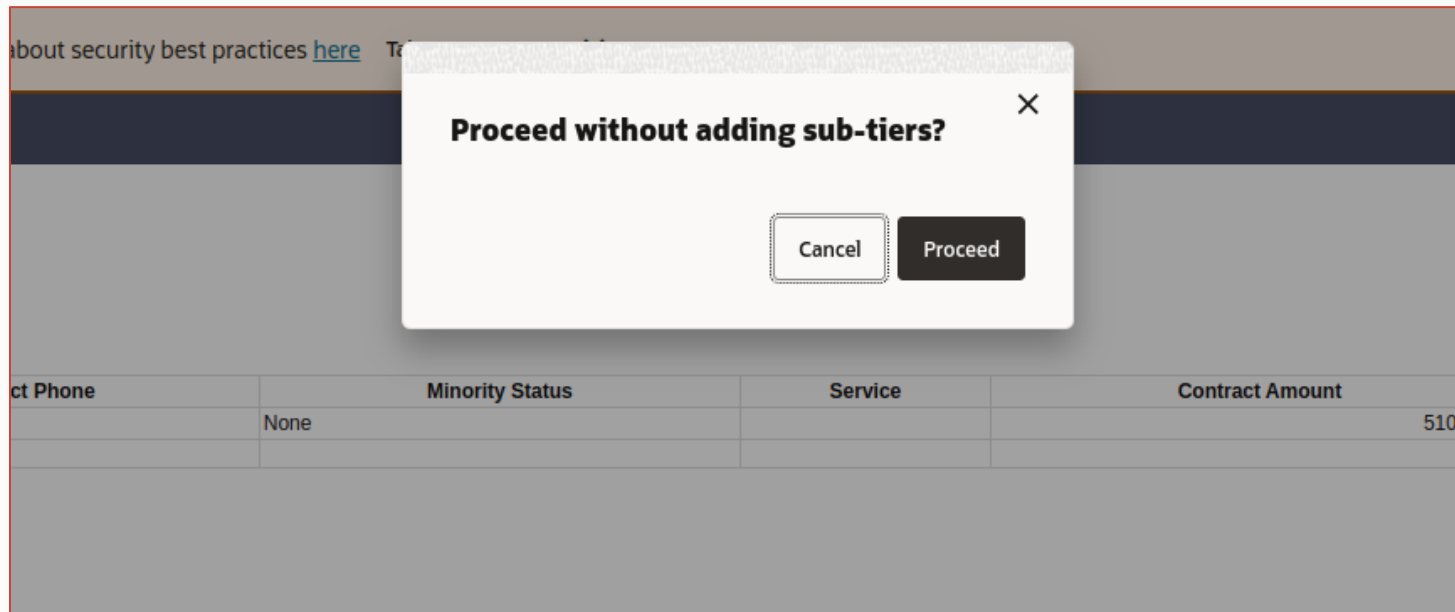
1. Child cannot access Record Sub-Tiers until Parent completes Record Sub-Tiers action.
 1. An alert will appear for the Child if Record Sub-Tiers is pending Parent submission.



Record Sub-Tiers – enhanced tracking and workflow

Subcontractor / Sub-Tier acknowledgement

1. All subcontractors are now required to acknowledge if no sub-tiers are participating on the projects during the Record Sub-Tiers workflow.



TPA Enrollment Audit Report



A	B	C	D	E	F	G	H	I	J	K
Program Name	Project Number	Project Name	Subcontract Number	Vendor ID	Subcontractor Name	Current Contract Value	Contact Name	Contact Email	Contact Phone	Enrollment A
TPAProgram_TPAgc1		TPA Secondary Org Project	2		TPAsub1	40,000.00				Enrolled
TPAProgram_TPAgc1		TPA Secondary Org Project	1		TPAsub1	20,000.00				Enrolled
TPA immediate disbursement program	4321	TPA immediate disbursement project	4321		TPAsub1	100,000.00				Enrolled
TPA cutoff date program	9876	Funded payment project	5	vend5	CPM Sub5 Inc.	100,000.00				Disabled
TPA cutoff date program	9876	Funded payment project	5	vend5	CPM Sub5 Inc.	100,000.00				Declined
TPA cutoff date program	9876	Funded payment project	4637	VENDOR1234	TPAsub1	100,000.00				Enrolled
TPA cutoff date program	9876	Funded payment project	333	vend3	TPAsub1	100,000.00				Disabled
TPA Scheduled disbursement program	123	TPA scheduled disbursement project	123		TPAsub1	1,000,000.00				Enrolled
TPA CAD program	987654	TPA CAD project	5678		TPA CA Sub1	100,000.00				Enrolled

TPA Declined Enrollment Report has been enhanced and renamed to **TPA Enrollment Audit Report**.

Change include:

- New selection criteria for Enrollment Status, Date Range, and Project
- Additional data columns for contact information and enrollment status

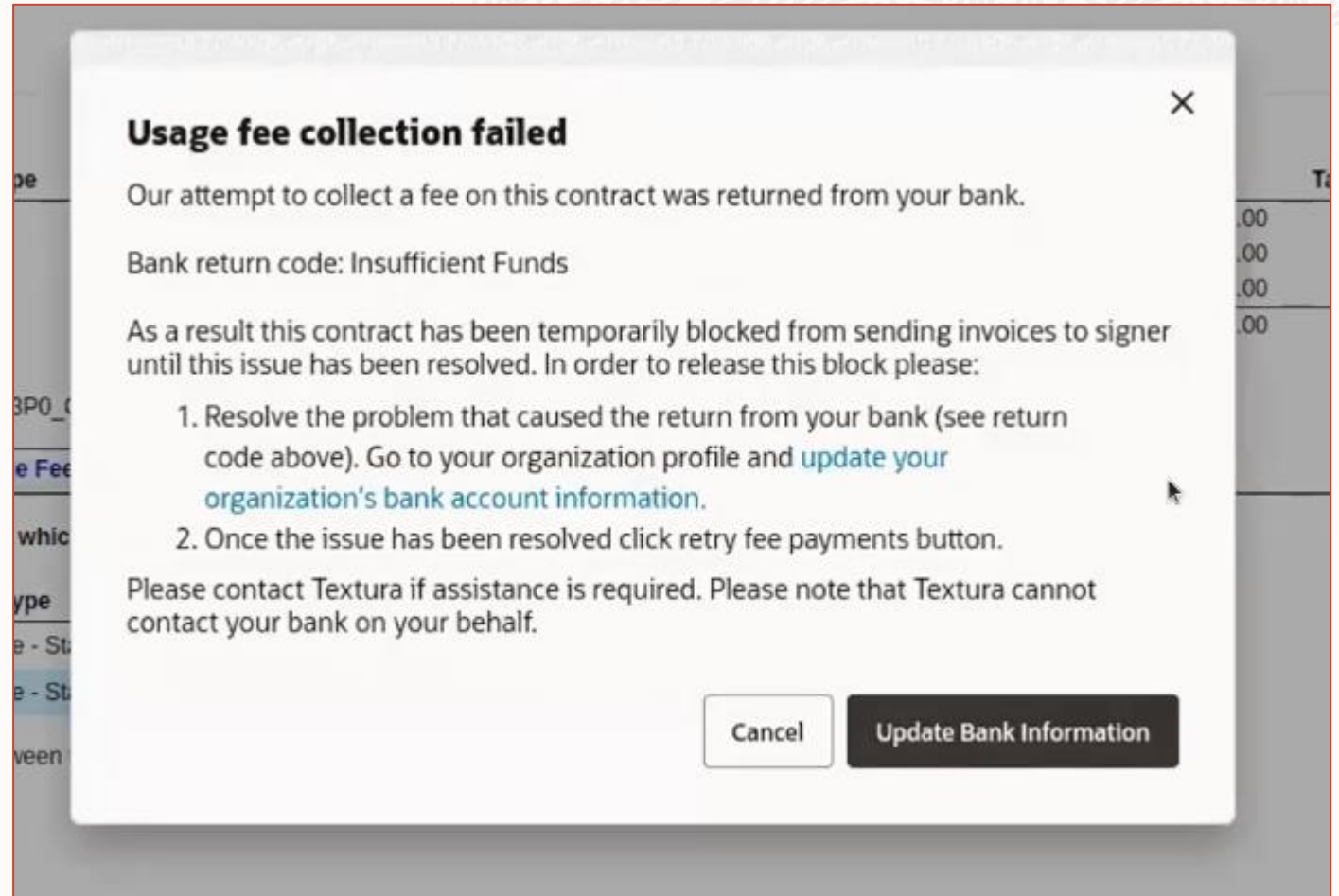


Subcontractors – usage fee retry process

The retry fee process for subcontractors has been updated.

Users will notice an updated UI experience, prompting administrators to update payment information if a usage fee has previously failed.

Once payment information has been updated and saved, administrators will be prompted to retry the failed usage fee.



Key Bugs Resolved in 24.2.0.0 release



- Contract Status issues on projects with TPA Split Payments
- Browse Projects organization filter
- Various other minor issues resolved



Existing page usability review and design testing


Who?

Daily or weekly users of the View Lien Waiver Status page

Details

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

View Lien Waiver Status							Draw 1	Draw 2	Draw 3		
Project Settings Invite New Subcontractor							- None -				Received Not Received Pending Hold On Hold Not in Draw Unapproved
Subcontractor or Supplier	Subcontract or Purchase (PO) Number	Service	Notice Date	Notice Amount	Notice	Joint Check	Uploaded Files Period To 31-Jul-2014	Uploaded Files Period To 31-Jul-2014	Uploaded Files Period To 31-Aug-2023	Final	
CPM Sub1 Inc.	1					No	progress	progress	not rcvd		
CPM Sub5 Inc.	5					No	progress	progress	not rcvd		
CPM Sub2 Inc.	2					No	progress	progress	not in draw		
CPM Sub3 Inc.	3					No	progress	progress	not in draw		
CPM Sub4 Inc.	4					No	progress	progress	not in draw		

 **How to sign up**

- Email dan.madigan@oracle.com



Q&A

**The next Level Up Webinar will be held on
Monday, February 26th at 2 PM CDT.**

Register here:

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

Thank you!

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