

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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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 v24.4.0.0 (**April 7, 2024**)
  - Feature Enhancements
3. Coming Soon!
  - Indicate when payment holds exist for unsigned UCLW
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](https://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>
- 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

[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)

- 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.

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

Email Address\*

First Name\*

Last Name\*

# Release Changes in v24.4.0.0

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# Summary of Changes

- 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.
- Document changes can now be applied mid-draw.
- Invoice Control Log now retains invoice history after invoice is removed from draw.
- Invoice number version is now incremented for rejected, removed, and re-submitted invoices.
- Invoice approvers will now receive a new warning when rejecting invoices.
- Supplier Tracking user experience improved for viewing and editing Sub-Tier diversity values.



# 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

The screenshot displays the Oracle Textura Payment Management interface. The top navigation bar includes the Oracle logo, the text 'Textura Payment Management', and user information for David Jones. Below this, a secondary navigation bar shows project details like 'Lincoln School' and 'General Construction'. The main content area is titled 'Document Sets' and features a tabbed interface with 'On-System' selected. A notification banner states: 'Document changes will apply immediately except when documents are ready for signature. If document set was applied after subcontractor signed documents, reject invoice to apply new documents.' An 'Add' button is present. Below is a table with columns for 'Document Set Name', 'Number of Contracts', and 'Actions'.

Document Set Name	Number of Contracts	Actions
On-system subcontractor and sub-tiers default documents	5	
Large Supplier Documents	0	



# Contract Specific Documents – add Document Set

Create a custom document set by selecting documents and indicate whether Notary is required.

The screenshot shows the Oracle Textura Payment Management interface. The main header includes the Oracle logo and 'Textura Payment Management'. Below the header is a navigation bar with 'Lincoln School', 'General Construction', and 'Find Draws'. A secondary navigation bar contains 'Project Home', 'My Contract', 'Subcontracts', 'Draw', 'Compliance', 'Project Setup', and 'Project Tools'. The main content area is titled 'Document Sets' and has two tabs: 'On-System' (selected) and 'Lien Waiver Only'. A blue notification states: 'Document changes will apply immediately except when documents are ready for signature. If document set was applied after subcontractor signed documents, reject invoice to apply new documents.' Below this is an 'Add' button and a 'Document Set Name' field. The main area displays 'On-system subcontractor and sub-tiers default documents'. On the right, a modal window titled 'Add Document Set' is open, showing a form for creating a new document set. The form includes: 'On-System Document Set Name' (Large Supplier Documents), a checked checkbox for 'Filter by documents available for your organization's bank country.', and five document selection rows. Each row has a dropdown menu and a 'Notary required' checkbox. The selected documents are: Invoice G702/703 (Large SoV), Sworn Statement None, Conditional Lien Waiver Conditional California Lien Waiver, Unconditional Lien Waiver Unconditional CA LW with Property Owner, and Pay-App Invoice Cover Sheet None. The 'Draft Invoice' dropdown is currently set to 'None'. At the bottom of the modal are 'Cancel' and 'Add' buttons.



# Contract Specific Documents – Assign documents sets

Unique documents can be assigned to all organizations participating on the project that use Textura to sign and submit documents.

The screenshot displays the Oracle Textura Payment Management interface. The main window shows a table of organizations with columns for Organization Name, Organization Type, Contract Number, Vendor ID, and Description. Two organizations, Green Corp and HVAC Corp, are selected. A dialog box titled 'Assign Document sets' is open, showing a dropdown menu for 'Document Set' with options: 'On-system subcontractor and sub-tiers default documents' and 'Large Supplier Documents'. The 'Assign' button is highlighted.

Organization Name	Organization Type	Contract Number	Vendor ID	Description	Assign
Blue Semiconductor	On System	002		Electric	On-s
PennyPack Systems	Lien Waiver Only			Wiring	Lien
<input checked="" type="checkbox"/> Green Corp	On System	001		Excavation and Pre-Const...	On-s
<input checked="" type="checkbox"/> HVAC Corp	On System	5		HVAC	On-s
<input type="checkbox"/> Spruce Street Contracting	On System	003		Concrete and Masonry	On-s
<input type="checkbox"/> Vision Corporation	On System	004		Painting & Design	On-s



# Documents can now be changed mid-draw

The screenshot displays the 'Project Settings' page with a navigation menu at the top: Project Home, My Contract, Subcontracts, Draw, Compliance, Project Setup, Project Tools, and Integration. The left sidebar lists various settings categories, with 'Documents' highlighted. The main content area is divided into sections for different document types, each with a 'Manage Documents' button:

- Conditional Lien Waiver**: None
- Pay-App Invoice Cover Sheet**: None
- On-system Subcontractors and Sub-Tiers Default Documents**: Invoice (G702/703)
- Conditional Lien Waiver**: None
- Pay-App Invoice Cover Sheet**: None
- Lien Waiver Only Sub-Tier Default Documents**: Conditional Lien Waiver (None)

Additional document sets listed on the right include: Unconditional Lien Waiver (Generic Lien Waiver), Self-Performed Work Invoice (None), Sworn Statement (None), Unconditional Lien Waiver (Generic Lien Waiver), Draft Invoice (G702/703 - Draft), and Unconditional Lien Waiver (Generic Lien Waiver).

A blue callout box at the bottom states: **Contract Specific Documents**. Contracts that require documents to differ from the default documents can be defined and applied to a contract from the [document sets](#) page. [Learn more](#)

Documents can be changed in an open draw and applied to participants who have not sent their documents to their organization's signer.

Changes can be applied from:

- Project Settings
- Document Sets



# Invoice Control Log – retain history if removed from draw

ORACLE Textura Payment Management

878 CS Demo - 1982 | 1982 - General Construction | Draw 2 - 23-Mar-2024

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

## Invoice Control Log

 Subcontract: 1990 (CPM Sub1 Inc.)

Signatory Approvals  Invoice Markup Details

Company: CPM General Construction | Owner: OW1 | Draws: 2  
 Project Name: 878 CS Demo | Project: 1982 | Period End Date: 20-Mar-2024  
 Subcontractor: CPM Sub1 Inc. | Vendor ID: | Subcontract App: 1  
 Contract Desc: | Contract: 1990 | Invoice Number:

**Declined to Submit**

Signer: Mark Johnson | Billed Amount: 0.00 | Retention Held: 0.00  
 Date: 20-Mar-2024 09:16 | Percent Complete: 10.00 | Retention Requested: 0.00  
 Tax: 0.00 | Payment Amount: 0.00 | Retention This Period: 0.00

Reason for declining to invoice:  invoice qualifies for Draw 1

Original Contract	Change Orders	Adjusted Contract	Previous Billed	Current Work Completed	Materials Stored	Total Completed & Stored	Retention Balance
40.00	0.00	40.00	4.00	0.00	0.00	4.00	0.40

Invoice Control Log history is now retained for:

- Draw closure
- Draw declined by subcontractor



# Invoice number version is now incremented for rejected, removed, and re-invited invoice

The screenshot shows the Oracle Textura Payment Management interface. The main heading is 'Integration Home' with a sub-heading 'Standard Web Services'. Below this, there are navigation tabs: 'Import Jobs', 'Export Jobs', 'Exported Records' (selected), 'Schedule Jobs', 'Configurations', and 'Settings'. A 'Save Exported Status...' button is present. The 'Record Type' is set to 'Invoices'. There are 'Saved Filters' and 'Reset Filters' buttons. The table below has the following columns: Resend, Project Name, Project Number, Type, Last Export, Export Job, Draw, Period To, Subcontractor, Vendor ID, Subcontract, Invoice Number, Invoice Amount, and ERP Status. A single record is displayed with the following values: Resend (checkbox), Project Name (Facebook2), Project Number (ACCTEST1), Type (Standard), Last Export (20-Mar-2024 20:01:49 IST), Export Job (536), Draw (7), Period To (31-Oct-2022), Subcontractor (CPM Sub1 Inc.), Vendor ID (ROXBORO), Subcontract (158), Invoice Number (07-F158A), Invoice Amount (1,500.00), and ERP Status (Pending). The bottom of the table shows 'Total: 1' and pagination information 'Page 1 of 1 (1 of 1 items)'.

Resend	Project Name	Project Number	Type	Last Export	Export Job	Draw	Period To	Subcontractor	Vendor ID	Subcontract	Invoice Number	Invoice Amount	ERP Status
<input type="checkbox"/>	Filter	Filter	All	19-Feb-2024 : 20-Mar-20...	536	All	All	Filter	Filter	Filter	Filter	All	All
<input type="checkbox"/>	Facebook2	ACCTEST1	Standard	20-Mar-2024 20:01:49 IST	536	7	31-Oct-2022	CPM Sub1 Inc.	ROXBORO	158	07-F158A	1,500.00	Pending

Invoices that are rejected, removed from a draw, and then re-invited to participate in the same draw will now have the invoice number correctly appended.

This enhancement will help mitigate integration errors.



# Invoice Approvers will now receive a new warning when rejecting

The warning message for invoice rejection is now enhanced to provide the user with information on the impacts of rejecting an invoice. If subsequent draws with invoices exist, the user will be notified which draws will be rejected and require re-submission from subcontractors.

The screenshot displays the Oracle Textura Payment Management interface. The main window shows a 'Manage Invoices' section with a table of invoices. A dialog box titled 'Reject invoices for draws 1-2?' is open on the right, containing a warning message, a comment field, and a list of acknowledgment checkboxes. The dialog box is highlighted with a red border.

Select All	Status	Spec Bill	Final Invoice	Organization	Contract	Documents (Attachments)	Scheduled Values	Work Completed		Material Stored This Period	Total Completed and Stored to Date	% Comp.	Balance to Finish	Retention		
								From Previous Application	This Period					Held This Period	%	Previously Held
<input checked="" type="checkbox"/>	Received			CPH Sub1 Inc	2220	<a href="#">View PDF</a>	10.00	0.00	1.00	0.00	1.00	10.00	9.00	0.10	10.00	0.00
<input type="checkbox"/>	Received			CPH Sub2 Inc	2221	<a href="#">View PDF</a>	11.00	0.00	2.20	0.00	2.20	20.00	8.80	0.22	10.00	0.00
Totals:							21.00	0.00	3.20	0.00	3.20	15.24	17.80	0.32	10.00	0.00
Approved Totals:							0.00	0.00	0.00	0.00	0.00	100.00	0.00	0.00	100.00	0.00

**Reject invoices for draws 1-2?**

**Some issues need your attention** X

Rejecting invoice for draw 1 will also reject all subsequent invoices. These invoices will move back to open status.

Comment to Subcontractors

Invoice Rejection Reason(s)

- Its First Invoice Rejection Text Placeholder
- Its Second Invoice Rejection Text Placeholder

Select at least one reason.

Acknowledgements

- I acknowledge that invoices for draws 1-2 will be rejected and any documents that have been signed by invoice approvers will be deleted permanently.
- I acknowledge any change orders that have been created after this draw will change draw context and be included in the first open draw.
- I acknowledge any budget activities such as adding or deleting line items, or adjustments to existing components from future draws will move back to the first open draw.

All acknowledgements must be selected.

Cancel Reject



# Supplier Tracking user experience improved for viewing and editing Sub-Tier diversity values.

Prime Subcontractors will now only see an Edit action on the Supplier Tracking screen. From the Edit action, they can View and Edit the Sub-Tier diversity values.

The screenshot displays the Oracle Textura Payment Management interface. At the top, a security risk warning is visible. The main navigation bar includes 'ORACLE Textura Payment Management' and 'Tools'. Below this, the breadcrumb trail shows 'Compliance Testing Project - CTP-123'. The 'Supplier Tracking' section features a search bar and a table of organizations. The table has columns for 'Organization' and 'Approved Values'. The first row shows 'CPM Owner - 1' with 'AABE' as the approved value. The second row shows 'CPM Sub5 Inc.' with a 'Pending submission' status. To the right, a detailed view for 'CPM Owner - 1' is shown, including a section for 'AABE (African American Business Enterprise)' with an 'Approved' status. Below this, a document titled 'test' is listed with a validity period from 21-Mar-2024 to 05-Mar-2025. An 'Attach Documentation' button is highlighted with a mouse cursor. At the bottom right of the detailed view are 'Cancel' and 'Submit' buttons.

Organization	Approved Values
CPM Owner - 1	AABE
CPM Sub5 Inc.	Pending submission





Coming Soon

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# 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.

ORACLE Textura Payment Management

Compliance Testing Project - CTP-123 | General Construction | Draw 3 - Draw 3 - 15-Dec-2023

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

### Manage Draw Payments

[Manage Lien Waivers](#) | 
 [View Lien Waiver Status](#) | 
 [View Document Status](#) | 
 [Hold Release Audit Report](#) | 
 [View Draw Request](#)

Notify Project Team:  Please enter message for your project team members here if selected.

Save and Update Totals

Nav	Edit	Select for Payment	Final Invoice	SC	Organization	Draw Comment	Contract Comment	Lien Waiver Status	Payment Method	Net Invoice	Discount	Payment Amount	Paid	Available to Pay	Pending Authorization	On Hold	Owner Approval Date	
	edit	<input type="checkbox"/>	No	3	CPM Sub1 Inc.			None	ACH	31,500.00	0.00	31,500.00	0.00	0.00	0.00	31,500.00		
		<input type="checkbox"/>	No	6	CPM Sub5 Inc.			Signed	ACH	13,500.00	0.00	13,500.00	0.00	0.00	0.00	13,500.00		
<b>Draw Totals:</b>										45,000.00	0.00	45,000.00	0.00	0.00	0.00	45,000.00		
<b>Disbursement Totals:</b>										<b>Disburse Amount</b>		<b>Draw 3 Payments to Date</b>						
Selected to be Paid										0.00		0.00						
Total Transfer Amount										0.00		0.00						
Subcontractor Transaction Fees										0.00		0.00						
<b>Total Amount of Checks</b>										0.00								



# Q&A

**The next Level Up Webinar will be held on  
Monday, April 29<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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