

## Textura Level Up Webinar

What's new with Textura in our Next Release

#### **Robert Garbacz**

Sr. Product Operations Manager Textura, Oracle CEGBU

March 25, 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. 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. 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>
   <a href="https://docs.oracle.com/cd/E97085\_01/1031448">https://docs.oracle.com/cd/E97085

#### **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





Release Changes in v24.4.0.0

#### **Summary of Changes**

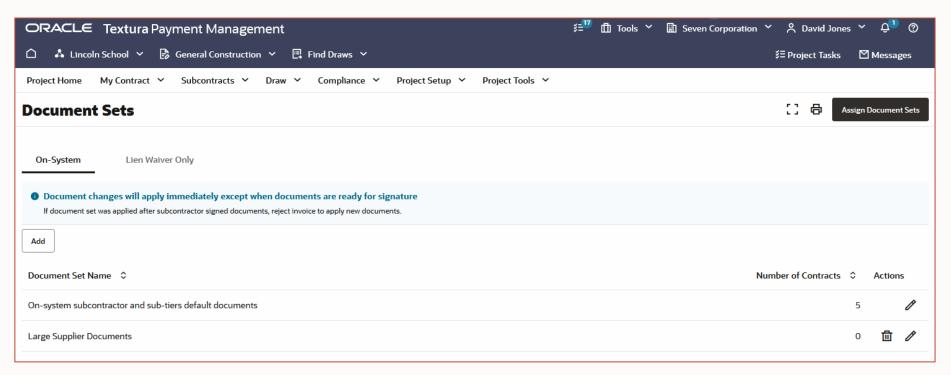
- Contract Specific Documents is now available for Owners and General Contractors to assign unique billing documents for one or a group of contracts on their projects.
- Document changes can now be applied mid-draw.
- Invoice Control Log now retains invoice history after invoice is removed from draw.
- 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.

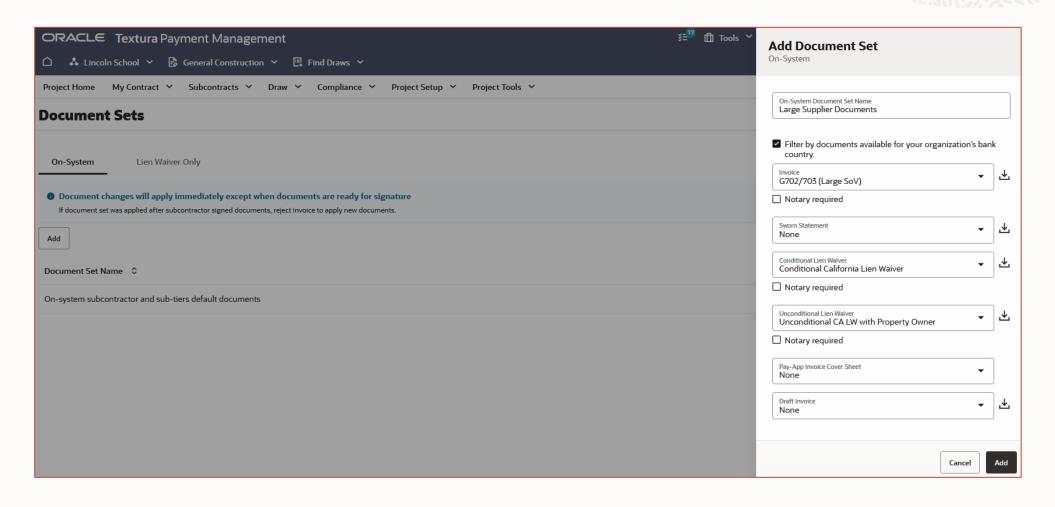
- Users with Create Projects permission can create and manage documents sets
- Use this page to view existing Documents Sets and to create new ones





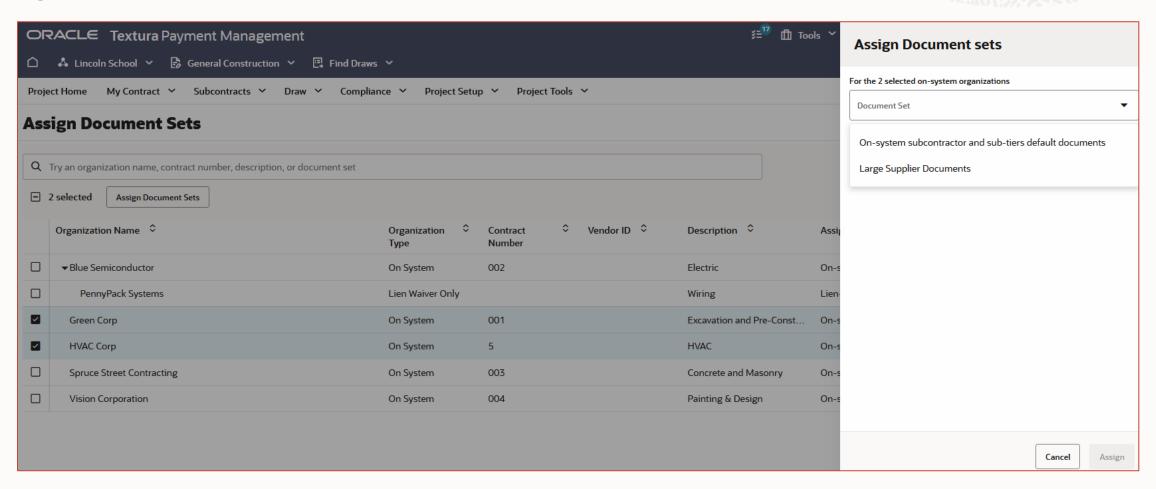
#### **Contract Specific Documents – add Document Set**

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



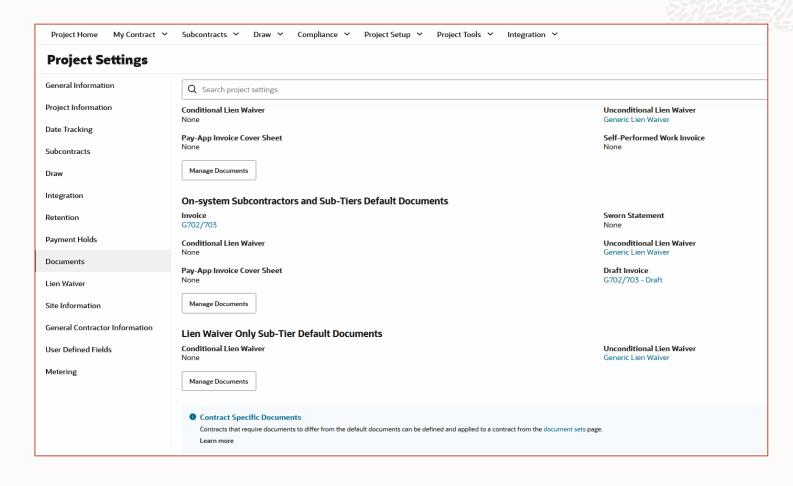
#### **Contract Specific Documents – Assign documents sets**

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





### Documents can now be changed mid-draw



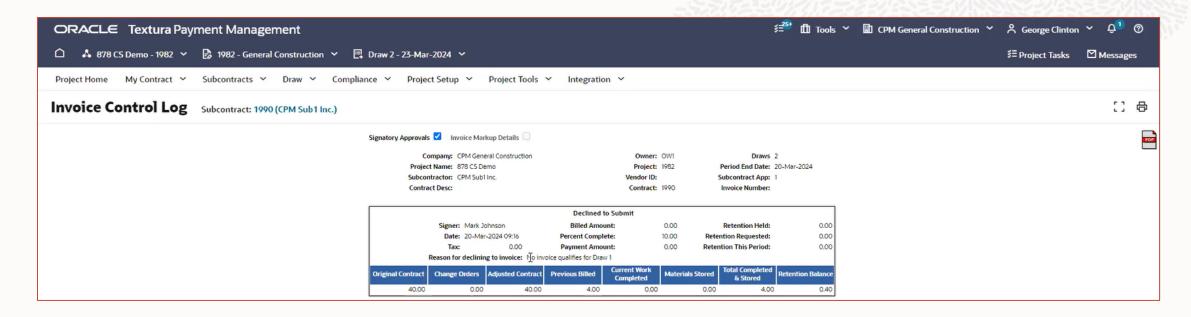
Documents can be changed in an open draw and applied to participants who have not sent their documents to their organization's signer.

#### Changes can be applied from:

- Project Settings
- Document Sets



### Invoice Control Log – retain history if removed from draw

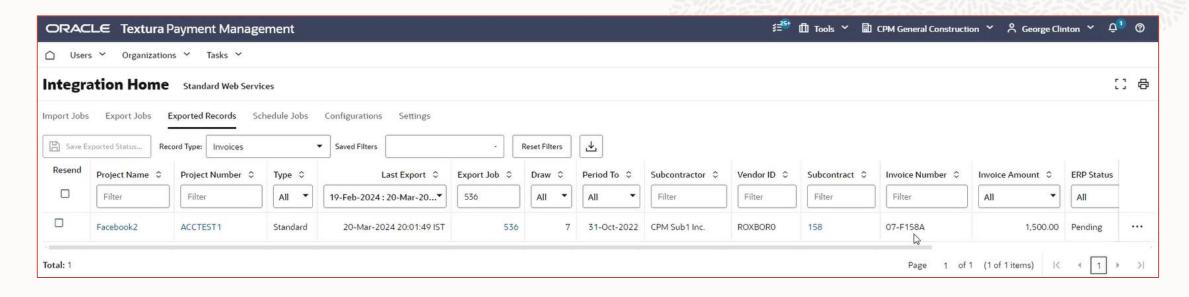


Invoice Control Log history is now retained for:

- Draw closure
- Draw declined by subcontractor



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



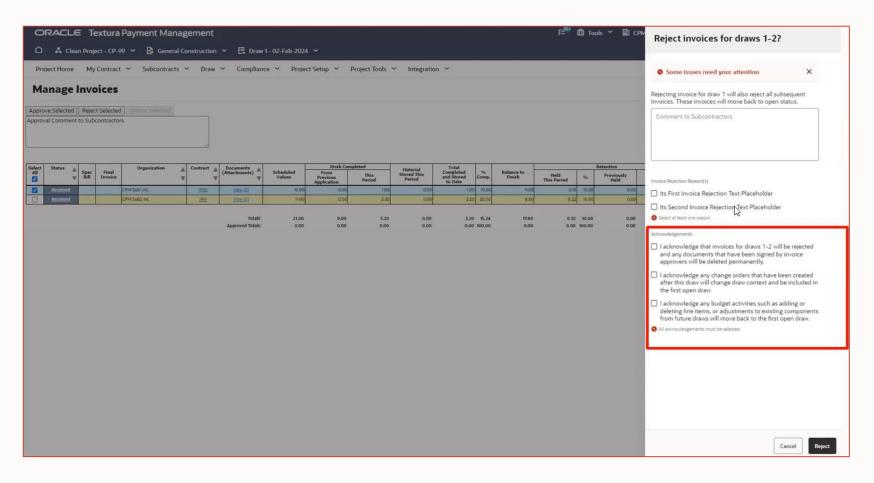
Invoices that are rejected, removed from a draw, and then re-invited to participate in the same draw will now have the invoice number correctly appended.

This enhancement will help mitigate integration errors.



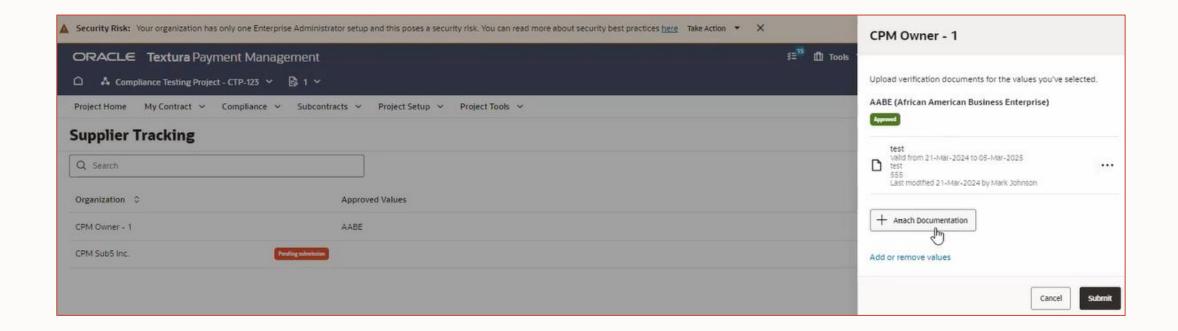
### Invoice Approvers will now receive a new warning when rejecting

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.



## 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.



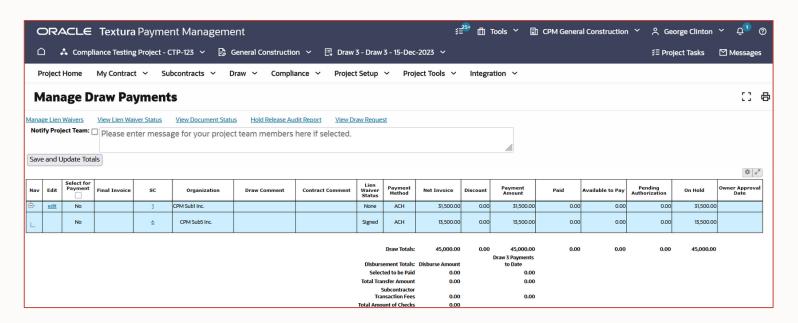


## Coming Soon

### 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.





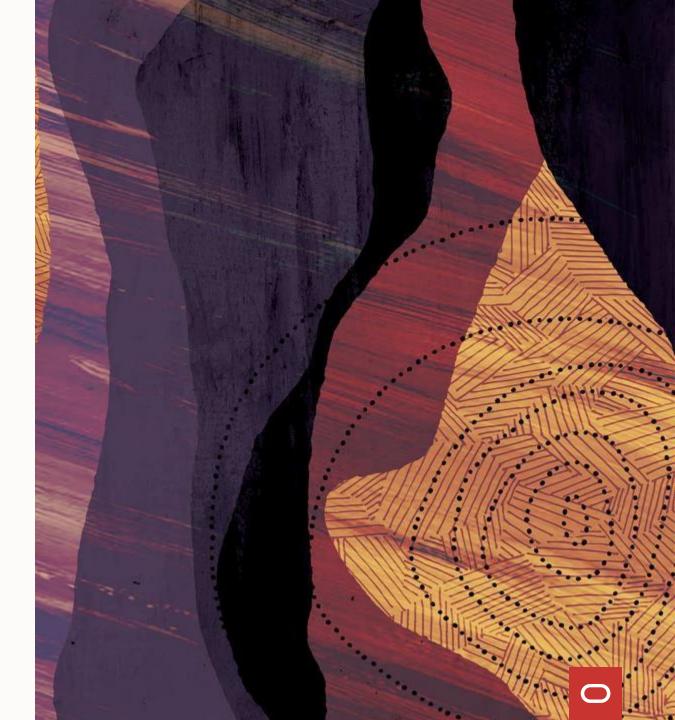
Q&A

The next Level Up Webinar will be held on Monday, April 29<sup>th</sup> at 2 PM CDT.

Register here:

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

## Thank you!



# ORACLE