

ORACLE

Textura Level Up Webinar

What's new with Textura in our Next Release

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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 v23.12.0.0 (**December 3, 2023**)
 - Key Bugs Resolved
 - Coming Soon!
3. Questions

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 v23.12.0.0

Summary of Changes



- **Enterprise Wide Disbursement** has been enhanced for improved usability and performance.
- A default for Track Expiration for **Standard Document Requirements** can now be set at the organization level.
- A **Textura Payment Accelerator** (TPA) program can now be set to be auto-assigned to new projects by default.
- Organizations adding Manual Contractors as **Sub-Tiers** on projects can now track the organization's TaxID.
- Key Bugs Fixed in 23.12



Enterprise Wide Disbursement – improved usability and performance

Enhancements include:

- Improved load performance when numerous payments are disburseable
- UX improvements to the disbursement and disbursement history modals
- Increased EWD page reliability (e.g. select all / unselect all behaviors)

Confirm Disbursement

You have selected the following payments for disbursement:

Funding Account	Account Number	Total Count	Total Amount	ACH Count	ACH Amount	TPA Count	TPA Amount
Seven Corporation	****7890	1	23,357.25	1	23,357.25	0	0.00
Totals		1	23,357.25	1	23,357.25	0	0.00

[Download Selected Payment Report](#)

Notify project team of disbursement

Required



Document Compliance – set Track Expiration default

ORACLE Textura Payment Management

Users Organizations Tasks

My Organization Settings

Organization Administration

Project Administration

Compliance

Roles and Permissions

Search Organization Settings

No items to display.

Add Calendar

Compliance

Default Document Compliance Status for Standard Requirements
Not Tracking

Default Document Compliance Status for Periodic Requirements
Not Applicable

Default Document Compliance Track Expiration Date for Standard Requirements
Do Not Track Expiration

Do Not Track Expiration

Against Period To Date

Against Current Date

Roles and Permissions

Disburser role required to release document compliance holds

Project funding edited by enterprise admins only

[My Organization Profile](#)

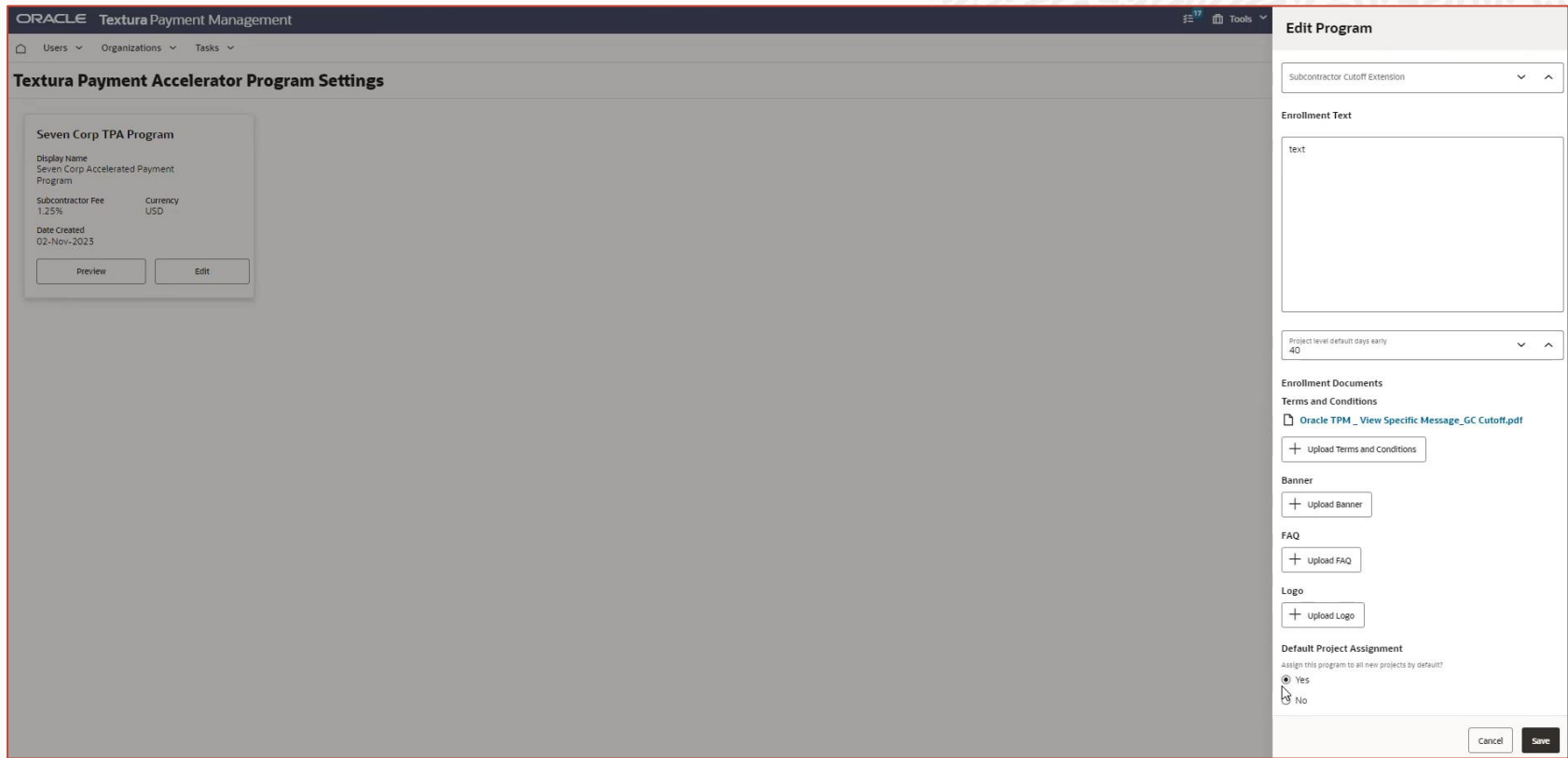
[My Integration Settings](#)

Save Changes

Track Expiration Date default for Standard Requirements

- Set default at organization level from My Organization Settings
 - Changes will apply to newly created Standard Requirements

Textura Payment Accelerator (TPA) – default project assignment



A TPA Program can now be configured to be auto-assigned to newly created projects. When enabled an option to retroactively apply to all existing projects will become available as well.



Sub-Tiers – track Tax ID for Manual Contractors

Line Del	Organization				Service	Contract Amount	Previously Paid	Current Payment	Balance Due
	Name	Status	Location	Minority Status					
	CPM Sub1 Inc.	Self	Phoenix, Arizona	None		350,000.00	0.00	22,500.00	327,500.00
	CPM Sub5 Inc.	On-Sys	Harwood Heights, Illinois	None		150,000.00	0.00	0.00	150,000.00
	CPM Owner	Manual	Harwood Heights, Illinois	None		0.00	0.00	0.00	0.00
	Subcontractors (On-Sys)					150,000.00	0.00	0.00	150,000.00
	Affidavit Lines Total:					0.00	0.00	0.00	0.00
	Contracted Total:					150,000.00	0.00	0.00	150,000.00
	Contracted as Percentage:					30.00%	0.00%	0.00%	31.41%
	Overall Total:					500,000.00	0.00	22,500.00	477,500.00

Organization Location Information

Organization Name* CPM Manual Contractor

Country United States

Address Line 1 7520 W. Lawrence Ave, Apt 1

Address Line 2 Harwood Heights, Illinois 60706

City Harwood Heights

State/Province Illinois

Postal Code 60706

Phone Number

Contact First Name

Contact Last Name

Tax ID 33-2130743

Save Cancel

Tax ID can now be tracked for Manual Contractors. The TaxID will be accessible from both the Record Sub-Tiers and the Edit Sub-Tier pages.



Key Bugs Resolved in 23.12 release



- Unable to Close Draw
- Enter Billing Information – issue saving billing data
- Contract Number incorrectly display on Contract Maintenance
- Enterprise Project Funding – project funding account displays default project funding account prior to confirmation
- Various other minor issues resolved



Coming Soon!

DocWriter Publishing



ORACLE Textura Payment Management

Users Organizations Tasks

Home

Administrative Tasks

[Template ready for review](#)

Enterprise Wide Disbursement

Total Count: 31

Recently Viewed Projects

Facebook1 FB1 GC - Three Project#1

Project List

My Recent Tasks

Template ready for review 2 months ago

Enter Billing for Draw 1.

Drag and Drop

Select a file or drop one here. Selected file: Submit Tar

Document Name	Status	Type	Created On	Created By
BEI EDF C LW #5	Published	Conditional Lien Waiver	05/09/2023	Textura Administrator
Pfizer Conditional Lien Waiver - 2020	Pending	Conditional Lien Waiver	05/09/2023	Textura Administrator
Conditional Lien Waiver	In Review	Conditional Lien Waiver	05/09/2023	Textura Administrator
Oregon Standard Unconditional Lien Waiver	Pending	Unconditional Lien Waiver	05/09/2023	Textura Administrator
FL UCLW	Pending	Unconditional Lien Waiver	05/09/2023	Textura Administrator
Michigan Lien Waiver	In Review	Unconditional Lien Waiver	05/09/2023	Textura Administrator
TX Unconditional Waiver	Rejected	Unconditional Lien Waiver	05/09/2023	Textura Administrator
Unconditional Alaska Lien Waiver	Pending	Unconditional Lien Waiver	05/09/2023	Textura Administrator



December session canceled

This is the last scheduled LevelUp Webinar for **2023**.

Next Webinar:

- January 29th, 2024 at 2pm CST



Q&A

**The next Level Up Webinar will be held on
Monday, January 29th at 2 PM CDT.**

Register here:

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

Thank you!

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