Oracle

Textura Payment Management
General Contractor Supplier Tracking Guide

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Title and Copyright Information

Oracle Textura Payment Management General Contractor Supplier Tracking Guide

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Tracking DEI Values and Goals Across Projects

Overview

Textura Payment Management (TPM) offers the ability to enter and track Diversity, Equity, and Inclusion (DEI) values for your organization, Subcontractors, and Sub-Tiers at any time. When added, DEI values display on certain compliance documents and within generated reports.

The **Supplier Tracking** page is a centralized hub for all DEI tracking and information on TPM. Create supplier tracking programs with specified DEI goals, approve or override DEI values submitted by Subcontractors, and see the total value of project funds currently paid towards your tracked values.

View program details to drill down into a selected program so you can see more detailed information about Prime Subcontractor organizations and their Sub-Tiers. You can also set individual DEI goals for each organization working on a project.

Consider watching one of our videos on supplier tracking for General Contractors:

- ***Supplier Tracking - Overview https://players.brightcove.net/2985902027001/default_default/index.html?videoId=6338080369112***
- ***Supplier Tracking - Creating Programs https://players.brightcove.net/2985902027001/default_default/index.html?videoId=6337440351112***

Supplier Tracking - Reviewing Qualifications https://players.brightcove.net/2985902027001/default_default/index.html?videoId=6337438507112

Tracking a DEI Value on a Project

This General Contractor Supplier Tracking Guide will walk you through the steps required to report your own organization's DEI values, set up a DEI supplier tracking program, create supplier program templates, and approve or override a Subcontractor's proposed DEI value. You can update a supplier tracking program or your own DEI values at any time from the **Supplier Tracking** page.

1) ***Create a supplier tracking program*** for a project. You can can both save the new program as a template for use on other projects and create multiple programs to track.
2) Optional. If applicable, ***enter your own DEI values***.

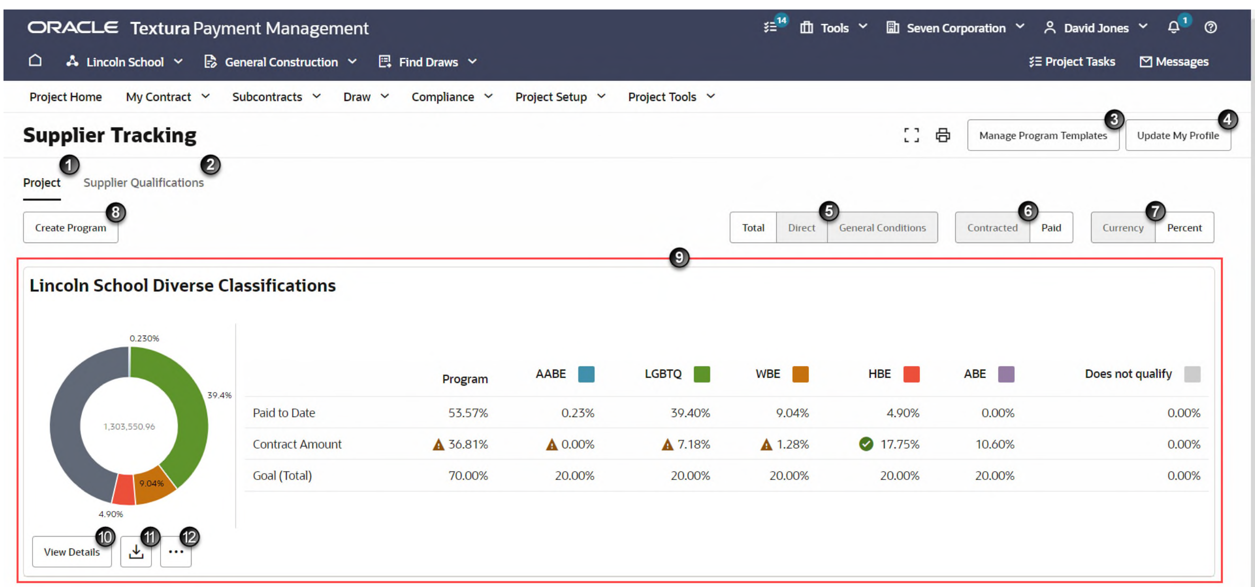
Note: Only Enterprise Administrators can update or edit your organization profile, including your organization's DEI values.

3) A Subcontractor organization receives the prompt to enter a DEI status. After entering the value, your organization will receive a task to review it.
4) ***Review and approve the Subcontractor's DEI value***. Once you approve a value, the **Supplier Tracking** page will update to show you progress tracked toward your set goals.
5) Optional. ***Override a Subcontractor's DEI value*** if you need to correct what the organization entered and submitted.
6) Optional. ***Use the* Supplier Tracking *page*** to view a donut graph and analytics for a program.

Additional Resources

- **In-App Help**: In the application, select **?** > **Help for this Page** in the top right corner of your page. The Help topics presented are context sensitive to the page you are on.
- ***Documentation Library*** (***https://docs.oracle.com/cd/E97085_01/10313806.htm***)
- ***Support*** (***https://docs.oracle.com/cd/E97085_01/10313339.htm***)

Working with the Project Tab of the Supplier Tracking Page



1) **Project Tab:** Track your classification status goals across all contracts participating in the project. This tab separates each program into its own section with a chart and table.
2) **Supplier Qualifications Tab**: A table displays the current status of values assigned to a Subcontractor and information on when certification documents expire. As a General Contractor, you will also use this tab to review submitted Subcontractor values. You can also choose to override a Subcontractor's values.

   See ***Working with the Supplier Qualifications Tab of the Supplier Tracking Page*** for more information on how to navigate and use this page.
3) **Manage Templates Button**: View, create, and edit program templates you created for the project. When you save a template, you can apply it to any future programs you create.

See ***Creating a Supplier Tracking Template*** for how to create a program template.

4) **Update My Profile Button**: Only available to Enterprise Administrators. Open a **Supplier Panel** pane on the right side of the page to update the classification status for your own organization.

   See ***Updating Your Organization's Supplier Tracking Values*** for more on how to declare a Diversity, Equity, and Inclusion (DEI) classification for your organization on TPM.

5) **Total, Direct, and General Conditions Buttons**: Filter the classifications table to show classifications defined as **Direct, General Conditions**, or both. By default, all business classifications are defined as "Direct." Direct classifications refer to contracts belonging to organizations who work directly on a project. General Conditions refer to contracts belonging to organizations or services that help support the project, but do not work on the project directly (such as security or waste management). Direct or General Conditions only applies to prime subcontracts.
6) **Contracted and Paid Buttons**: Set how you would like to view classifications data in the in the donut-shaped chart. Choose either **Contracted** or **Paid** amounts.
7) **Currency and Percent Buttons**: Set how you would like to view classifications data in the in the donut-shaped chart. Choose either **Currency** or **Percentage** totals.
8) **Create Program Button**: When you track classification values on TPM, you can create and track multiple programs from the **Supplier Tracking** page. Select the **Create Program** button to either create a new program or choose an existing program template to add to your supplier tracking for the project.

   See ***Creating a New Supplier Tracking Program*** and ***Creating a New Supplier Tracking Program from a Template***.

9) **Classification Status Summary**: Displays payment details for the supplier program across all contracts on the project. A donut-shaped chart provides a visual representation of your funds allocation for the supplier tracking program. Each classification status included in the program is represented by a unique color. Details in the table include the total amount of funds paid to eligible program participants, the value of funds paid towards contracts with tracked certifications, and the amount of funds paid towards your set program goal. You can either view these values as a dollar amount or a percentage.

   The order of values which appear in the table are dependent on your priority tracking order.

   See ***Updating Priority Values*** for the steps to changing the priority order of tracked classification values.

10) **View Details Button**: Select the **View Details** button to view more detailed data about a tracked classification status. After approving a Subcontractor's classification status, it is automatically assigned to the Subcontractor on the **Allocation** tab of this page.

    See ***Working with the Allocation Tab of the Supplier Tracking Page*** for more information about this tab.

11) **Program Download Report** button: Download the details available in the **Supplier Program Table** as an Excel report file.

    See ***Program Download Report*** for more information.

12) **Modify Program Menu** button: Either edit or delete the program. When you choose to edit a program, you can also change the priority order of your tracked classification values. If you choose to delete a program, you will receive a prompt to confirm your decision to delete it. Once deleted, you can no longer view the program's data, past or present, or generate reports based on the program.

Creating a New Supplier Tracking Program

To create a new supplier tracking program:

1) ***Navigate to the Supplier Tracking Page*** (see page 16).
2) From the **Supplier Tracking** page, select the **Create Program** button.

   A **Program Type?** dialog box displays.
3) From the **Program Type** dialog box, select the **Create New Program** option.
4) Select the **Continue** button.

   A **New Project Program** pane opens on the right side of the page.
5) From the **New Project Program** pane, enter a name for your new program.
6) Optional. Enter a percentage between 0 and 100 to define a goal for the program.
7) Optional. Enter a description. This description is shown to Subcontractors participating on the project.
8) Add program values. Either:
   - Select an existing value.

   a. From the drop-down list, select one of the application's 17 standard classification values.

   b. Optional. In the **Goal** field, enter a numeric value between 0 and 100. The total percentage of all classification statuses tracked in the program cannot exceed 100%.

   c. Select **Add** to include the value in your program.
   - Create a new value.

   a. Enter a code for the new diversity status.

   > **Notes:**
   >
   > - Your code can contain letters, numbers, spaces, and - (en dash). Other special characters are not allowed.
   > - Consider formatting the code in the same way as one of the existing standard diversity statuses. For example, **AABE** for **African American Business Enterprise** or **VBE** for **Veteran Business Enterprise**.

   b. Enter a name for the diversity status.

   c. In the **Goal** field, enter a numeric value between 0 and 100. The total percentage of all classification statuses tracked in the program cannot exceed 100%.

   d. Optional. If your new status does not require documentation, select the **Do not require a certificate** option.

   e. Select **Add** to include the value in your program.

9) Optional. Select the **Inherit to sub-tiers** option to require Subcontractors to submit DEI values for any of their Sub-Tiers working on the project,
10) Optional. Save the program as a template. When you save a template, you can easily and quickly apply these same values to any new programs you create for the project.
11) Select 

.
    - The **New Program** pane closes.
    - A **Classification Status Summary** for the new program displays on the page.
    - A **Success** message displays, confirming you created a new program.

Watch a video on how to create a supplier tracking program.
https://players.brightcove.net/2985902027001/default_default/index.html?videoId=6337440351112

Creating a New Supplier Tracking Program from a Template

If you saved a previous program as a template, you can use that template to quickly and easily create additional programs on the **Supplier Tracking** page. You can later edit the program if you need to make additional changes.

To create a new supplier tracking program from an existing template:

1) ***Navigate to the Supplier Tracking Page*** (see page 16).
2) From the **Supplier Tracking** page, select the **Create Program** button.
   A **Program Type?** dialog box displays.
3) From the **Program Type?** dialog box, choose the **Select a program template** option.
4) From the drop-down list, select a template.
5) Select the **Continue** button.
    - A **Classification Status Summary** for the new program displays on the page.
    - A **Success** message confirms you added the program.

Creating a Supplier Tracking Template

To create a Supplier Tracking template:

1) ***Navigate to the Supplier Tracking Page*** (see page 16).
2) From the **Supplier Tracking** page, select the **Mange Program Templates** button.
   A **Program Templates** pane opens on the right side of the page.
3) From the **Program Templates** pane, select the **Create** button.
4) Enter a name for your new program.
5) Optional. Enter a percentage between 0 and 100 to define a goal for the program.
6) Optional. Enter a description. This description is shown to Subcontractors participating on the project.
7) Add program values. Either:
    - Select an existing value.

a. From the drop-down list, select one of the application's 17 standard classification values.

b. Optional. In the **Goal** field, enter a numeric value between 0 and 100. The total percentage of all classification statuses tracked in the program cannot exceed 100%.

c. Select 

to include the value in your program.

- Create a new value.

a. Enter a code for the new diversity status.

> **Notes:**
>
> - Your code can contain letters, numbers, spaces, and - (en dash). Other special characters are not allowed.
> - Consider formatting the code in the same way as one of the existing standard diversity statuses. For example, **AABE** for **African American Business Enterprise** or **VBE** for **Veteran Business Enterprise**.

b. Enter a name for the diversity status.

c. In the **Goal** field, enter a numeric value between 0 and 100. The total percentage of all classification statuses tracked in the program cannot exceed 100%.

d. Optional. If your new status does not require documentation, select the **Do not require a certificate** option.

e. Select 

to include the value in your program.

8) Select the **Create** button.
   - The **Program Template** pane closes.
   - A **Success** message displays, confirming you added the template.

Editing a Supplier Tracking Template

To edit a supplier tracking template from the **Supplier Tracking** page:

1) ***Navigate to the Supplier Tracking Page*** (see page 16).
2) From the **Supplier Tracking** page, select the **Manage Program Templates** button.
   A **Program Templates** pane opens on the right of the page.
3) From the **Program Templates** pane, select the  **Edit** icon.
   The **Diversity Program** pane opens with the template's settings.
4) Make the required changes to update the template.
5) Update an existing goal percentage by entering a new goal value.

> **Note:** When editing, remember you need to have a program name. This is a required field and you cannot save the template without it.

6) After you finish your edits, select the **Update** button.

- The **Program Templates** pane closes.
- A **Success** message displays, confirming you updated your template.

Deleting a Supplier Tracking Template

To delete a supplier tracking template from the **Supplier Tracking** page:

1) ***Navigate to the Supplier Tracking Page*** (see page 16).
2) From the **Supplier Tracking** page, select the **Manage Program Templates** button.

   A **Program Templates** pane opens on the right of the page.
3) From the **Program Templates** pane, select the **Delete** icon next to the program you want to delete.

   A **Delete Template?** prompt displays at the top of the pane.
4) From the **Delete Template?** prompt, select **Delete**.

   The template's name disappears from the panel and you can no longer choose the deleted template when creating a new program.

Editing a Program Value

To edit a program goal:

1) ***Navigate to the Supplier Tracking Page*** (see page 16).
2) From the **Supplier Tracking** page, select the **Actions** icon in the section for the program you need to edit.

   The program pane opens on the right side of the page.
3) Select a program goal to expand it.
4) In the **Goal** field, enter a new value.

   The value will automatically display in the pane when you collapse the value's row.
5) Select **Update** at the bottom of the pane.

Updating Program Value Priority

The DEI classification value with the highest tracking priority displays on the **Allocations** tab of the **Supplier Tracking** page. If you decide you would rather place more focus on a different value, you can change the priority order of your tracked values at any time from the **Program** panel.

To update the priority status of your tracked values:

1) ***Navigate to the Supplier Tracking Page*** (see page 16).
2) From the **Supplier Tracking** page, select **Edit** from the **Modify Program Menu** for the program you want to update.
   - A **Program** pane opens on the right side of the page.
   - All currently tracked values display in the **Program Values** section.

3) Select and drag a classification value to change its priority order. The value positioned at the top of the list is assigned first priority for tracking.
4) Select the **Update** button.
   - The **Program** pane closes.
   - A **Success!** message displays, confirming you updated your program.

Deleting a Program Value

To edit a program goal:

1) ***Navigate to the Supplier Tracking Page*** (see page 16).
2) From the **Supplier Tracking** page, select the ••• **Actions** icon in the section for the program you need to edit.

   The program pane opens on the right side of the page.
3) Select a program goal to expand it.
4) Select the **Delete** button.

   The value disappears from the pane and will no longer be tracked on this supplier tracking program.
5) Select **Update** at the bottom of the pane.

Updating Your Organization's Supplier Tracking Values as a General Contractor

You can track and select the Diversity, Equity, and Inclusion (DEI) values and submit certifications for the DEI categories/values that are applicable to your organization. As a General Contractor, you can add your DEI values for supplier tracking from either your **My Organization Profile** or **Supplier Tracking** page.

> **Note**: Only Enterprise Administrators can add or update DEI values.

To edit your DEI values for your supplier tracking status:

1) Navigate to the **Supplier Tracking** pane for your organization.

   Either:
   - From the **Supplier Diversity Tracking Values** section of the **My Organization Profile** page, select the **Manage Values** button.
   - From the **Supplier Tracking** page, select the **Update My Profile** button.

   A **Supplier Tracking** pane opens on the right side of the page.
2) From the **Supplier Tracking** pane, select all applicable classification values for your organization.

Textura offers 17 standard classification options. If you do not see your status listed in the **Standard Diversity Values** section, you can add a customized status. Custom values display under the **Other Values** section.

See ***Creating a New Project Program*** for information on how to create a custom diversity value to track on a project.

3) Select **Continue**.
4) When prompted, add certification documentation for each diversity value.
   a. From the section for a classification value in need of a certification document, select the **Attach Document** button.
   b. Either drag and drop a document into the **Drag and Drop** section or select the section to use **File Explorer** to find your document.
   c. In the **Document Name** field, enter a name to define the document. This name will display in TPM when you view your documents associated with the diversity status.
   d. Enter the **Start Date** and **Expiration Date** for the document. When the certification document expires, you will need to upload a new one.
   e. Enter the certifying agency and certificate number in the available fields.
5) Select **Continue**.
   - The **Supplier Tracking** panel closes.
   - The **My Organization Profile** page shows how many diversity statuses you assigned to your organization.

Program Download Report

The **Program Download Report** displays all the details available in the **Supplier Program Table** as an Excel report file. This report summarize all the key statistics from each supplier tracking program.

You can use this report to:

- track the progress and performance across all Subcontractors participating in a program.
- view and download a comprehensive overview of a particular program.
- display a granular view of all subcontractors participating on a program.
- View the project overview, program details, and program spend.
- view the contract amount and paid to date totals within each program and also at the subcontractor level.

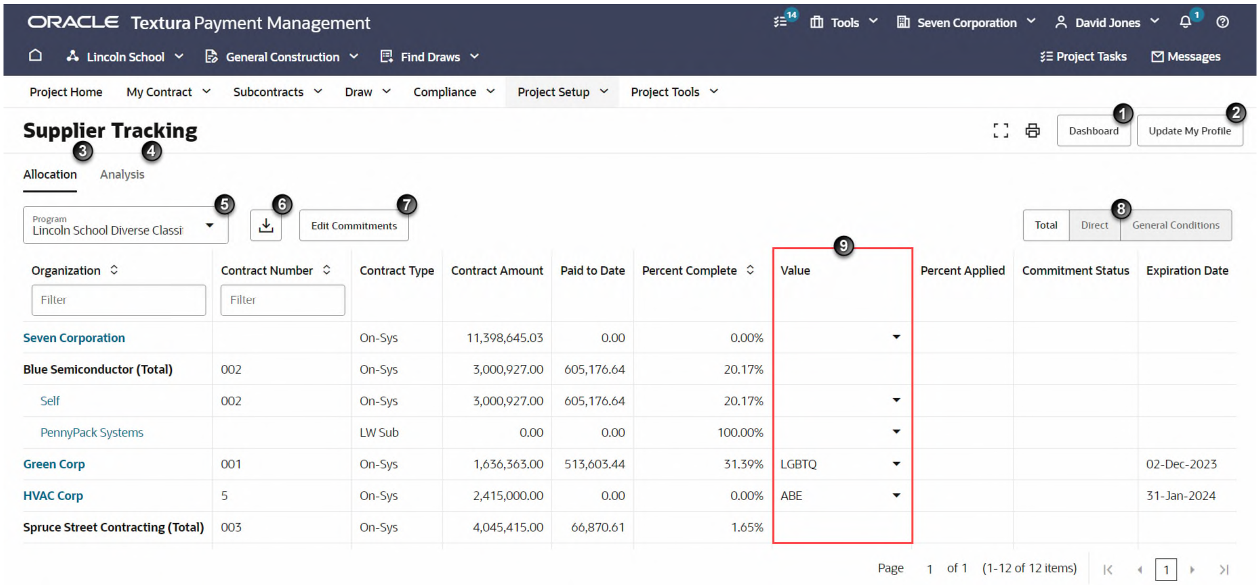
To view and download the Program Download Report:

1) ***Navigate to the Supplier Tracking Page*** (see page 16).
2) Select the **Program Download Report** icon.

Working with the Allocation Tab of the Supplier Tracking Page

The **Allocation** tab of the **Supplier Tracking** page offers a more in depth look at the tracked classification statuses in a chosen program. Organizations are listed in a table in alphabetical order with Sub-Tiers nested beneath their Prime Subcontractors.

To navigate to the **Allocation** tab, select the **View Details** button for a program.



1) **Dashboard Button:** Return to the **Project** tab of the **Supplier Tracking Dashboard**. From the dashboard, you can access all programs associated with your project.

   See ***Working with the Project Tab of the Supplier Tracking Page*** for how to use this tab.

2) **Update My Profile Button**: Only available to Enterprise Administrators. Open a **Supplier Panel** pane on the right side of the page to update the classification status for your own organization.

   See ***Updating Your Organization's Supplier Tracking Values*** for more on how to declare a classification status for your organization on TPM.

3) **Allocation Tab:** This is the default tab you will see when you select the **View Details** button from the **Supplier Tracking** page. A table shows project funding and how it is allocated toward tracked Diversity, Equity, and Inclusion (DEI) classification values.

4) **Analysis Tab:** View all participating Subcontractors and their current DEI classification value status. Use this tab to view Prime Subcontractor commitments against the chosen program.

5) **Program Drop-down Menu**: This drop-down menu includes all supplier tracking programs created for the project. Select a project to see a detailed view of your Subcontractors, contract fund information, their classification values, and commitment information.

6) **Report Download Button**: Export the table of data as a **Project Supplier Tracking Report**. Once the report finishes generating, you can download the finished report from the **View Reports** page. This report is in a CSV format.

7) **Edit Commitments Button**: Set commitments for the classification statuses tracked in your program. When you create a commitment, the classification is tracked at the prime contract level and you can track different goals for each organization working on the project.

   See ***Editing Commitments*** for the steps to setting up commitments.

8) **Total, Direct, and General Conditions Buttons**: Filter the classifications table to show classifications defined as **Direct, General Conditions**, or both. By default, all business classifications are defined as "Direct." Direct classifications refer to contracts belonging to organizations who work directly on a project. General Conditions refer to contracts belonging to organizations or services that help support the project, but do not work on the project directly (such as security or waste management). Direct or General Conditions only applies to prime subcontracts.

9) **Value Column**: Only classification values your General Contractor organization approved appear in this column. The value displayed in the table is dependent on the priority you assigned to the classification status when setting up your program. Though a Subcontractor may have several values assigned to their organization, you can only assign one value to a Subcontractor per program.

   To change the tracked value for a single organization, you can use the drop-down in the **Value** column to select a different available value.

   If you need to change the priority of your tracked values for all Subcontractors in the program, you can reorganize and change the order of values from the **Program** pane.

   See ***Updating Priority Values*** for more information on how to assign priority to classification statuses.

Allocation Supplier Tracking Fields Overview

Organization

Lists the name of the Subcontractor and Sub-Tier Subcontractors. The Prime Subcontractor is listed below the General Contractor and the Sub-Tier Subcontractors nest beneath their Prime Subcontractor. When a Sub-Tier Subcontractor is configured, the Prime Subcontractor amounts will display against **Self** line. Select the organization name to view an **Organization Information** pane on the right side of the page.

The **Organization Information** pane shows the **Job Type** (Direct or General Conditions), the organization's **Self-Identified Supplier Tracking Values**, and a section for tracked values in the supplier tracking program.

See ***Changing a Percentage of a Payment for a Classification Value*** for more information on how to use these fields.

Hover over the ⓘ to view additional details about the organization, including the **Contract Number**, **Organization Type**, **Service**, and **Contract Amount**. If you are viewing a Sub-Tier, you can select the **Edit Sub-Tier** link to update the Sub-Tier's organization information on the ***Edit Sub-Tier https://docs.oracle.com/cd/E97085_01/TPMhelp/en/North_America/10303155.htm*** page.

Contract Number

Displays the subcontract number or purchase order number for the Subcontractor.

Contract Type

Specifies the type of contract in relation to working on TPM. Types include:

- **On-Sys**: An on-system organization. This organization bills, signs document, and receives payment through TPM.

- **LW Sub**: A Lien Waiver Only Sub-Tier. This organization signs lien waivers through TPM, but submits billing and receives payment outside of the application.
- **Manual:** A manual Sub-Tier. This organization works entirely outside of TPM, submitting billing, signing documents, and receiving payments manually without the aid of the application. Manual Subcontractors often provide goods or services for a Prime Subcontractor.

Contract Amount

Lists the total amount of the subcontract.

Paid to Date

Shows the amount paid to the Subcontractor toward the commitment, including pending payments.

Percent Complete

The percentage of work completed on a contract.

Value

The tracked DEI classification value for an organization. If a Subcontractor has more than one value, this table tracks the value given the highest tracking priority.

See ***Working with the Alllocation Tab of the Supplier Tracking Page*** for more information about how to use this column.

Percent Applied

The percentage value of funds paid toward a committed goal.

Commitment Status

Shows whether an organization's commitment was met or not. A **Warning** icon displays when there is an outstanding commitment.

Expiration Date

The date when a submitted classification document expires. If a document expires, you will need to upload a new one to verify your DEI classification status.

Analysis Supplier Tracking Fields Overview

After setting up commitments from the ***Allocation tab of the Supplier Tracking page***, you can select the **Analysis** tab to see a more detailed view of the goals set for your supplier tracking program.

> **Note:** Only organizations with set commitments display in this table. If you chose the **No Commitment** option for a Subcontractor, you will not see their name or Sub-Tiers.

Two bars at the top of the page track the progress toward your program goals. The first bar shows how close you are to fulfilling your contract commitments while the second shows progress toward the paid to date goal.

Organization

Lists the name of the Subcontractor and Sub-Tier Subcontractors. The Prime Subcontractor is listed below the General Contractor and the Sub-Tier Subcontractors nest beneath their Prime Subcontractor. When a Sub-Tier Subcontractor is configured, the Prime Subcontractor amounts will display against **Self** line.

Applicable Contract Value

The total amount of the contract tracked toward the certification value goal. This value is compared to the **Paid to Date % of Commitment** value to determine whether an organization is fulfilling goal commitments.

Commitment Percent

The total percentage of the classification commitment the listed organization committed to completing.

Commitment

The **Applicable Contract Value** multiplied by the **Commitment Percent**.

Paid to Date % of Commitment

The percentage value of funds paid toward a commitment.

Paid to Date

The value of funds paid toward a committed goal.

Prime Contribution %

The contributed value a Prime Contractor reported towards a committed goal.

Sub-Tier Contribution %

The contributed value a Sub-Tier Subcontractor reported toward a committed goal.

Editing Commitments

Commitments are goals which are tracked at the Prime Subcontractor level.

To edit supplier tracking commitments from the **Supplier Tracking** page:

1) ***Navigate to the Supplier Tracking Page*** (see page 16).
2) From the **Supplier Tracking** page, select the **View Details** button for a program.

   The **Allocation** tab displays.
3) From the **Allocation** tab, select the **Edit Commitments** button.

   A **Prime Subcontractor Commitments** pane opens on the right side of the page.
4) From the pane, choose to track commitments by either a **Fixed amount** or a **Percentage of the contract**.
5) In the **Total** column for a commitment, enter a percentage between 0 and 100. This is the total percentage of the values tracked for a Subcontractor. You can enter a different percentage for each organization.
6) Optional. Add a percentage in the column for each tracked value. The sum of each column in a row cannot exceed the value in the **Total** column.

7) Optional. Select the **No Commitment** check box if you do not need a Subcontractor to fulfill a set supplier tracking commitment.
8) Select **Close**.

   The pane closes and the table calculations update to reflect your changes.

Changing a Percentage of Payment for a DEI Classification Value

You can change the percentage of a payment applied to a designated classification value from the **Allocation** tab of the **Supplier Tracking** page.

To update a percentage:

1) Navigate to the Supplier Tracking Page.
2) Select the **View Details** button for a program.

   The **Allocation** tab displays.
3) From the table on the **Allocation** tab, select the name of an organization.

   An **Organization Information** pane opens on the right side of the page.
4) From the **Value** drop-down in the **Organization Information** pane, select a classification value to change.
5) In the **Percent Applied** field, either increase or decrease the value.
   - The value must be between 0 and 100.
   - Adjusting the percentage will also adjust the amounts in the **Contract Amount** and **Paid to Date** columns for the classification on the Allocation tab.
6) Select the **Save** button.
   - The **Organization Information** pane closes.
   - The table updates to reflect your changes.

Navigate to the Supplier Tracking Page

- To navigate to the **Project** tab:

  From the **Compliance** menu at the top of any project page, select **Supplier Tracking**.
- To Navigate to the **Supplier Qualifications** tab:
  - From the **Compliance** section of the **Project Home** page, select the **Review supplier tracking program values pending approval** link to go to the **Supplier Qualifications** tab of the **Supplier Tracking** page.

    > **Note:** This link is only available if a Subcontractor's classification status is pending review.

  - From the **Compliance** menu at the top of any project page, select **Supplier Tracking**. Once on the **Supplier Tracking** page, select the **Supplier Qualifications** tab.

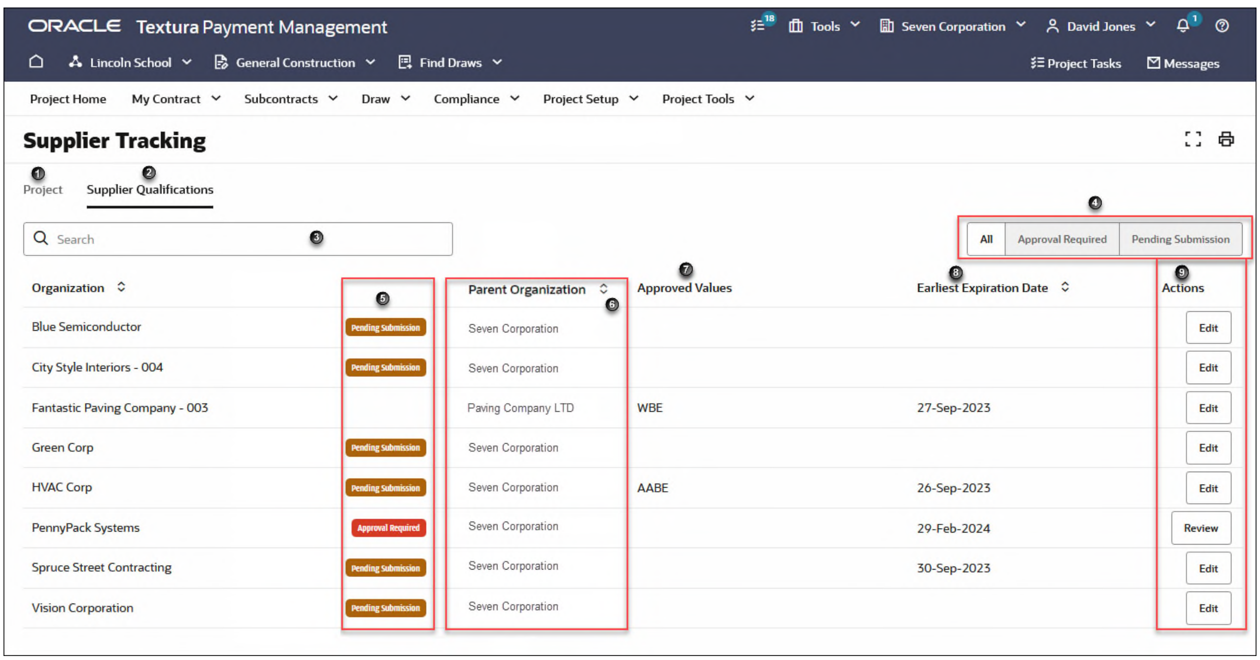
Supplier Qualifications

The **Supplier Qualifications** tab displays all supplier organizations working on a project and includes their Diversity, Equity and Inclusion (DEI) status and certificate. From this tab you can:

- Approve/reject an organization's DEI submission.
- Add a DEI value on behalf of your Subcontractor, or Sub-Tier.
- Attach DEI certificates.
- Track organizations that have not yet submitted their DEI values.
- View organizations with expired certification.

> **Note:** Only Enterprise Administrators and Regular Users with Project Manager and Compliance Manage roles can view this tab.

Working with the Supplier Qualifications Tab of the Supplier Tracking Page



1) **Project Tab:** Track your classification status goals across all contracts participating in the project. This tab separates each program into its own section with a chart and table. See ***Working with the Project Tab of the Supplier Tracking Page*** (on page 4).
2) **Supplier Qualifications Tab**: A table displays the current status of DEI values assigned to an organization, and information on when certification documents expire. As a General Contractor, you will also use this tab to review submitted Subcontractor values. You can also choose to override a Subcontractor's values.
3) **Search Box**: Enter to search for a specific supplier organization.
4) **All**, **Approval Required**, and **Pending Submission Tabs**:
   - **All**: Displays all supplier organizations associated with a project.

- **Approval Required**: Displays organization that have submitted their DEI values which require your approval.
- **Pending Submission**: Displays organizations that have not yet submitted their DEI values.

5) **Status Indicator**: Statuses include **Pending Submission** and **Approval Required**. The **Approval Required** label is displayed if there is at least one DEI value that requires your approval. If an organization needs to submit their DEI value, the **Pending Submission** label is displayed.
6) **Parent Organization Column**: Displays the name of the parent organization which contracted the Subcontractor or Sub-Tier. A parent organization is always one level above the Subcontractor or Sub-Tier. **For example:** A Subcontractor contracted by the General Contractor will display the General Contractor organization's name in the **Parent Organization** column. If that Subcontractor has a Sub-Tier working for them, the Subcontractor organization's name will display in the **Parent Organization** column for the Sub-Tier Organization's row in the table. In the case where a Sub-Tier has a contract with multiple organizations, the column will list the name and contract number of each parent organization.
7) **Approved Values Column**: Displays the DEI values that have been approved for an organization.
8) **Earliest Expiration Date**: Displays the date an organization's DEI certificate is due to expire. If there are multiple certificates, the earliest date is displayed in the column.
9) **Actions Column**:
   - **Edit Button:** Select to assign or update an organization's DEI value.
   - **Review Button:** Select the **Review** button to approve or reject the DEI value and certificate submitted by an organization.

Reviewing Supplier Tracking Program Values

You can review the DEI values and certificates submitted by your supplier organizations (Subcontractors and Sub-Tiers) from the **Supplier Qualifications** tab. From this tab, you can approve or reject the submitted values and certificate. When you approve or reject a supplier tracking program value, it is automatically added/deleted to all project programs which use the same program value.

> **Note:** You must approve a DEI certificate and value before you can use it in a program to track goals.

1) ***Navigate to the Supplier Qualifications Tab of the Supplier Tracking Page*** (see page 21).
2) If you navigated to the **Supplier Qualifications** tab from the **Compliance** menu, choose an organization and select the **Review** button from the **Actions** column.

   The **Review Supplier Tracking Submission** pane is displayed.

3) Select the ••• **Actions** icon to review the attached certificate.
4) Select **Approved** or **Rejected**.

5) If you selected **Rejected**, enter the reason you are rejecting the submission.
6) Select **Update**.

Notes on Rejection

- Rejecting a value for a Subcontractor on a project will also reject the value for the Subcontractor on all projects within your organization.
- If you accidentally rejected a DEI value, you can reopen the **Review Supplier Tracking** pane and change the **Value Status** to **Approved**.

Assigning Supplier Tracking Values

You can assign Diversity, Equity, and Inclusion (DEI) values and submit certifications for the DEI categories/values that are applicable to your supplier organization (Subcontractors or Sub-Tiers) working on your project.

1) ***Navigate to the Supplier Qualifications Tab of the Supplier Tracking Page*** (see page 21).
2) If you navigated to the **Supplier Qualifications** tab from the **Compliance** menu, choose an organization and select the **Edit** button from the **Actions** column.
3) Select the **Add Value** button.

   The **Supplier Tracking** pane displays.
4) From the **Supplier Tracking** pane, select all applicable diversity statuses for your organization.
5) Select **Apply**.
6) Select **Attach Documentation** to add certification documentation for each diversity value.
   a. Either drag and drop a document into the **Drag and Drop** section or select the section to use **File Explorer** to find your document.
   b. In the **Document Name** field, enter a name to define the document. This name will display in TPM when you view your documents associated with the diversity status.
   c. Enter the **Start Date** and **Expiration Date** for the document. When the certification document expires, you will need to upload a new one.
   d. Enter the certifying agency and certificate number in the available fields.
   e. Select **Attach**.
7) Select **Update**.

Supplier Tracking Overrides

You can assign or add additional Diversity, Equity, and Inclusion (DEI) values on behalf of your Subcontractors and Sub-Tiers. For each DEI value you add, you must attach the required certification.

If your supplier organizations have submitted their values, you can either modify the value or approve/ reject the value. When you modify the value submitted by your Subcontractor or Sub-Tier, a status of **Overridden** is displayed and the Subcontractor is notified that the value was rejected. The status of **Rejected** or **Approved** is added for values that you approve or reject.

> **Note**: Rejecting a value for a Subcontractor on a project will also reject the value for the Subcontractor on all projects within your organization.

Modifying Supplier Qualification Values Submitted by Subcontractors

You can modify the Diversity, Equity, and Inclusion (DEI) values and certificates submitted by your supplier organizations (Subcontractors and Sub-Tiers).

1) ***Navigate to the Supplier Qualifications Tab of the Supplier Tracking Page*** (see page 21).
2) If you navigated to the **Supplier Qualifications** tab from the **Compliance** menu, choose an organization and select the **Edit** button from the **Actions** column.
   The submitted values, certificate, and the status of the submission is displayed.
3) To attach additional documentation, select the **Attach Documentation** button and follow the instruction on Step 7.
4) To modify the values, select the **Modify Values** button. A **Supplier Tracking** pane opens on the right side of the page.
5) From the **Supplier Tracking** pane, select all applicable values for your organization.
6) Select **Apply**.
   The value will be added to the page with the status **Overridden**.
7) Select the **Attach Documentation** button.
   a. Either drag and drop a document into the **Drag and Drop** section or select the section to use **File Explorer** to find your document.
   b. In the **Document Name** field, enter a name to define the document. This name will display in TPM when you view your documents associated with the diversity status.
   c. Enter the **Start Date** and **Expiration Date** for the document. When the certification document expires, you will need to upload a new one.
   d. Enter the certifying agency and certificate number in the available fields.
   e. Select **Attach**.
8) Select **Update**.

The value you added or modified is now listed in the **Approved Values** column.

Tip:

- Select the **Action** icon to view the attached certificate.
- All values added by a GC on behalf of a Subcontractor or Sub-Tier will be listed in the **Approved Values** column

Navigate to the Supplier Qualifications Tab of the Supplier Tracking Page

- From the **Compliance** section of the **Project Home** page, select the **Review supplier tracking program values pending approval** link to go to the **Supplier Qualifications** tab of the **Supplier Tracking** page.

> **Note:** This link is only available if a Subcontractor's classification status is pending review.

- From the **Compliance** menu at the top of any project page, select **Supplier Tracking**. Once on the **Supplier Tracking** page, select the **Supplier Qualifications** tab.