Oracle
Textura Payment Management
Document Sets for Owners (Australasia)

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Title and Copyright Information

Contents

Creating and Using Document Sets for Owners

Overview

When working as a Head Contractor organisation, you will select the documents Subcontractors sign as a part of their claims process.

Document sets offer users with the **Create Projects** user permission flexibility and control over which documents organisations will interact with when working on your project. Either use a singular document set as a default for all on-system Subcontractors or Statutory Declaration Only Sub-Tiers (SD Subs) or create and assign a unique document set to specific contracts.

Each document set for an on-system organisation will include at least a payment application document and unconditional statutory declaration option, but you can also add a conditional statutory declaration, statement, pay-app progress claim cover sheet, and payment schedule. A document set for SD Subs must include an unconditional statutory declaration, but you can also require a conditional statutory declaration.

Note: Only users with the **Create Projects** user permission can create, update, and view document sets. See the User Permissions List for Head Contractors topic for more information on this and other user permissions available to on the **Edit User** page when you work as a Head Contractor.

Serial Approval and Document Sets

Serial Signatory Approval requires multiple Approvers to approve an invoice in a specific order. If you plan on using serial approval on either a single contract or as the default approval method on a project, you need to make sure the number of approvers assigned to a contract matches the number of approvers supported by your selected document.

See *Serial Approval Scenarios for Owners* for four different ways to set up serial approval on the application.

FAQs

- *What happens when I update a document in the middle of a period?* (see page 11)
- *Why do I need to assign documents to on-system organizations separately from statutory declaration only organisations?* (see page 11)
- *Why don't I see a "Witness Required" tick box when selecting a document?* (see page 11)
- *Why is there a warning when I select some documents for my document set?* (see page 11)

Additional Resources

▸ **In-App Help**: In the application, click the **?** > **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***)

Serial Approval Scenarios for Owners

There are several different workflows and options to consider when using the serial signatory approval method on a project or contract. Select a scenario below to expand it and view the different steps you should take when setting up serial signatory approval.

Your project uses serial signatory approval but does not require approver signatures

This scenario does not account for document sets. Serial approval is required for all subcontracts by default, uses the default documents you selected during your project setup workflow, and does not require approvers to apply their signature to the Subcontractor document during the review process.

Expand Steps

One of your subcontracts uses serial signatory approval and requires approver signatures

This scenario does not account for document sets. Serial approval is required for specific contracts, uses the default documents you selected during your project setup workflow, and requires your signatory approvers to apply their signature to the Subcontractor document during the review process.

Expand Steps

Your project uses serial signatory approval, requires approver signatures, and has a document set assigned for Subcontractor documents

A project uses document sets and the Subcontractor is assigned either the project's default or a unique document. Approvers are required to sign Subcontractor documents when reviewing them in a specified order. If the Subcontractor is assigned a document set which differs from the default, the documents included in the set require the same number of approvers and approver signatures as the default.

Expand Steps

Your project uses serial signatory approval, requires approver signatures, and has a document set assigned for Subcontractor documents, but the number of approvers for the document set does not match the default number of approvers
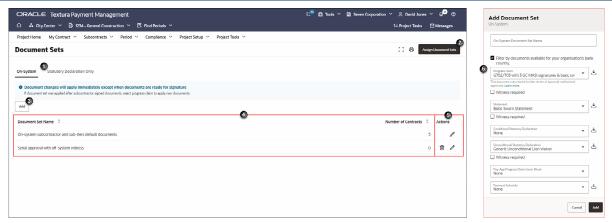
A project uses document sets and the Subcontractor is assigned either the project's default or a unique document. Approvers are required to sign Subcontractor documents when reviewing them in a specified order. If the Subcontractor is assigned a document set which differs from the default, the documents included in the set require a different number of approvers and approver signatures than the default.

Expand Steps (see page 15)

Navigate to the Document Sets Page

▶ From the **Documents** section of the **Project Settings** page, select the **document sets** link.
▶ From the **Project Setup** menu at the top of any project page, select **Document Sets**.

Working with the Document Sets Page for Owners

1) **Organisation Tabs**: You can create document sets for both Subcontractors and their Sub-Tiers. Create a document set for Subcontractor organisations on the Subcontractors tab and select the Statutory Declaration Only tab to create a set for Statutory declaration Only Sub-Tiers (SD Subs). Document sets for Subcontractors can include a progress claim, unconditional statutory declaration, conditional statutory declaration, statement, pay-app progress claim cover sheet, and payment schedule. Document sets for SD Subs can only include a conditional and unconditional statutory declaration.

2) **Assign Document Sets Button**: After setting up one or more document sets, select the **Assign Document Sets** button to navigate to the **Assign Document Sets** page. You will use the **Assign Document Sets** page to assign one of the document sets you created to an organisation working on your project.

3) **Add Button**: Select the **Add** button to create an additional document set. When you finish, information about the new document set will display in the table beneath the default document set.

4) **Document Set Table**: Displays the default document set and any sets you create on this page. After you create a document set, its name and the number of contracts assigned to it will display in the table.

   You can select the **Edit** icon from the **Actions** menu to update document sets at any time. Document changes will go into effect during an in-progress period until the Subcontractor sends their progress claim to their Signer. After that point, the documents will take effect in the following period unless you reject the Subcontractor's progress claim after they submit it.

5) **Actions Column**: Edit or delete additional document sets. You can edit the default document set, but cannot delete it. When you edit the default set, those changes are reflected in your project settings.

You cannot delete a document set if it is currently assigned to a contract. To delete a document set assigned to a contract, you will need to assign a different document set first.

6) **Document Sets Pane**: When you select the **Add** button, the **Add Document Set** pane will open on the right side of the page. Use this pane to choose which document templates to include in the set and to specify whether or not they require witnessing.

> **Note:** The witness selection appears only for documents that support witnessing.

Creating a Document Set for Owners

To create a document set while working as a Head Contractor:

1) *Navigate to the Document Sets Page* (see page 5).
2) Select the **On-System** tab to create a document set for your Subcontractors and any On-System Sub-Tiers working on your project.

> **Note:** To create a document set for a Statutory Declaration Only Sub-Tier (SD Sub), select the **Statutory Declaration Only** tab.

3) Select the **Add** button.

   An **Add Document Set** panel opens on the right side of the page.
4) In the panel, enter a name for your document set.
5) Optional. Select the **Filter by documents available for your organisation's bank country** tick box to limit the documents available for selection to those compatible with your banking country.
6) Select a progress claim document.
7) Select a statutory declaration.
8) Optional. If applicable, select an option for the following documents:
   ‣ Sworn Statement
   ‣ Conditional Statutory Declaration
   ‣ Pay-App Cover Sheet
   ‣ Draft Progress Claim.

> **Note for all documents:** If the document requires serial approval signatures a message about reviewing your approval method and approvers displays. Select the Learn More link to see a help page with different scenarios surrounding serial approval and the steps you should take when setting up approval.
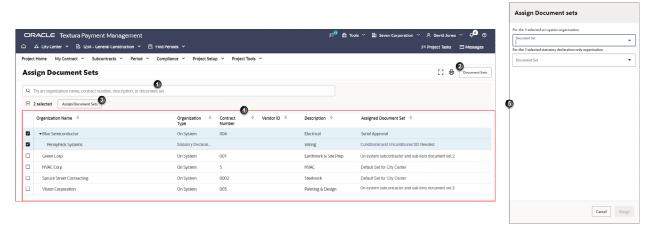
9) Select the **Add** button.
   ‣ The document set displays in the **Document Set** table. If this is your first created document set, it automatically becomes the default document assigned to the organisations working on your project.
   ‣ A **Document Set Added** message displays at the bottom of the page.

▸ You can now add additional document sets or *assign the document set* to an organisation.

Assign Document Sets for Owners

After creating one or more document sets as an Owner acting as a Head Contractor, users with **Create Projects** user permissions can use the **Assign Document Sets** page to assign one them to a specific contract.

Working with the Assign Document Set Page for Owners

1) **Search Bar**: Use the search bar to filter the table to items based around your search term. You can search by organisation name, contract number, contract description, or document set.
2) **Document Sets Button**: Select the **Document Sets** button to navigate to the **Document Sets** page. There, you can edit or create document sets you will later assign to either a Subcontractor or a Statutory Declaration Only Sub-Tier (SD Sub).
3) **Assign Document Sets Button**: Use this button to assign a document set to the selected organisations.
4) **Assign Document Set Table**: Lists all organisations working on your project, including the Sub-Tiers of your Subcontractors. You can assign document sets to both Subcontractors and SD Subs as long as you have at least one document set up for that organisation type.
5) **Assign Document Sets Pane**: Opens on the right side of the page when you select the **Assign Document Sets** button.

Assigning a Document Set

To assign a document set:

1) *Navigate to the Assign Document Set Page* (see page 8).
2) From the **Assign Document Sets** page, select one or more organisations. Select the tick box at the top of the table to select all available organisations.
3) Select the **Assign Document Sets** button.

An **Assign Document Sets** pane opens on the right side of the page.

4) From the **Document Set** drop-down list in the **Assign Document Sets** pane, select an available document set.

> **Notes:**
>
> - Depending on which organisations you selected on the **Assign Document Sets** page, you may see two drop-down lists, one for on-system and one for statutory declaration only organisations.
> - If the document requires serial approval signatures, a message about reviewing your approval method and approvers displays. Select the Learn More link to see a help page with different scenarios surrounding serial approval and the steps you should take when setting up this approval method.

5) Select the **Assign** button.

- ▸ The panel closes and the name of the document set assigned to the organisation displays in **Assigned Document Set** column.
- ▸ A **New Document Sets Assigned** message displays at the bottom of the page.

Navigate to the Assign Document Set Page

From the **Document Sets** page, select the **Assign Document Sets** button.

Additional Information

Assign Document Sets Table Field Overview

Organisation Name

The name of the organisation participating on a project. This includes Subcontractors, On-System Sub-Tiers, Statutory Declaration Only Sub-Tiers (SD Subs), and Manual Sub-Tiers (Manual Subs).

Organisation Type

The type of organisation participating on the project. A project participant's organisation type determines how they interact with the application.

Contract Number

A number used to define a contract. This is the contract belonging to the organisation participating on your project.

Vendor ID

The number your accounting package uses to identify a Subcontractor.

Description

A brief description of work explaining the purpose of the contract that will display on the claim documents.

Assigned Document Set

The name of the document set currently assigned to an organisation.

Frequently Asked Questions

What happens when I update a document in the middle of a period?

If you update the documents in a document set before a Subcontractor sends everything to their Signer, the new documents will be available at the time of signing for the current period.

However, if you change the documents mid-period after an organisation already signed their documents but before you disburse payment, the new documents will go into effect in the next period. If you want the documents to be available during the current period, you will first need to reject the organisation's period documents.

Why do I need to assign documents to on-system organizations separately from statutory declaration only organisations?

The number of documents available for on-system organisations differs from that available to Statutory Declaration Only Sub-Tiers (SD Subs).

An on-system organisation might be expected to sign a progress claim, unconditional statutory declaration, statutory declaration, statement, pay-app progress claim cover sheet, or payment schedule while SD Subs can only sign unconditional and conditional statutory declarations. For this reason, these two organisation types need separate document sets and assignments.

Why don't I see a "Witness Required" tick box when selecting a document?

The **Witness Required** tick box only displays when you select a document which supports electronic witnessing.

> **Note:** Electronic witnessing is not recognised in most Australasian projects.

Why is there a warning when I select some documents for my document set?

When a contract or project uses the serial signatory approval workflow, the documents chosen for a document set must support the correct number of approver signatures. You also need to make sure the assigned number of signatory approvers matches the number of expected signatures in the chosen document. If there is a mismatch, you will see an error message.

> See Serial Approval Scenarios for Head Contractors or *Serial Approval Scenarios for Owners* for an example of some of the different ways you can set up serial approval.

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Serial Approval Scenarios

Expand Steps

Note: The above links in this topic go to Head Contractor help topics. When you work as a Head Contractor on a project as an Owner organisation, you will follow similar workflows.

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1) Ensure your approvers are assigned the **Claims Approver** user permission.

   See Updating a User Profile for Head Contractors for how to make changes to a user profile.

2) Set up serial approval in your project settings.

   From the **Period** section, select the **Require serial approval signatures on progress claims** option**.**

   See the Period Settings topic for more information on this and other period-related project settings.

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3) Assign signatory approvers on the **User Role** page.

   To specify who will review and sign a submitted Subcontractor document and in what order, assign the **Serial Signatory Approvers** project role. The number assigned to a user signifies the order in which your serial signatory approvers will approve and sign a document.

Expand Steps

Note: The links in this topic go to Head Contractor help topics. When you work as a Head Contractor on a project as an Owner organisation, you will follow similar workflows.

---

1) Ensure your approvers are assigned the **Claims Approver** user permission.

   See Updating a User Profile for Another User for how to make changes to a user profile.

2) Require approval signatures in your project settings.

   ‣ From the **Subcontract** section, select the **Signature Serial Approval** option for the **Default Subcontractor Claim Approval Method for New Subcontracts**.

   ‣ From the **Period** section of your **Project Settings** page, select the **Require serial approval signatures on progress claim** option**.**

   See the Subcontract Settings and Period Settings topics for more information on these and other subcontract and period-related project settings.

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3) Create a subcontract with the **Serial Signatory Approval** progress claim approval option.

If the project does not use the serial signatory approval method by default, you will need to specify this approval method when creating a subcontract. Choosing this option tells the application to prompt your serial signatory approvers to approve and sign the Subcontractor's submitted period documents in a set order.

See the Contract Fields and Settings topic for more information on approval methods and other available contract settings.

4) Assign signatory approvers on the **User Role** page.

To specify who will review and sign a submitted Subcontractor document and in what order, assign the **Serial Signatory Approvers** project role. The number assigned to a user signifies the order in which your serial signatory approvers will approve and sign a document.

Expand Steps

Note: Some of the following links will go to a Head Contractor help topic. When you work as a Head Contractor on a project as an Owner organisation, you will follow similar workflows.

1) Ensure your approvers are assigned the **Claim Approver** user permission.

See Updating a User Profile for Head Contractors for how to make changes to a user profile.

2) Set up serial approval in your project settings.

   ‣ From the Subcontract section, select the **Signature Serial Approval** option for the **Default Subcontractor Claim Approval Method for New Subcontracts**.

   ‣ From the **Period** section, select the **Require serial approval signatures on progress claim** option**.**

See the Subcontract Settings and Period Settings Head Contractor topics for more information on these and other subcontract and period-related project settings.

3) *Create a document set*.

A document set includes the documents you expect a Subcontractor to sign while submitting their billing documents. These documents, at minimum, include a progress claim and an unconditional statutory declaration, but you can also require conditional statutory declarations and sworn statements. You can assign a unique document set to individual subcontracts.

In order to use the serial signatory approval method, the documents chosen for your document sets must allow multiple approval signatures.

4) *Assign a document set*.

If a Subcontractor is required to submit documents which differ from the project's default document set, use the **Assign Document Sets** page to select and assign an available document set to the organisation.

Expand Steps

> **Note:** Some of the following links will go to a Head Contractor help topic. When you work as a Head Contractor on a project as an Owner organisation, you will follow similar workflows.

1) Ensure your approvers are assigned the **Claim Approver** user permission.

   See Updating a User Profile for Head Contractors for how to make changes to a user profile.

2) Set up serial approval in your project settings.

   ‣ From the Subcontract section, select the **Signature Serial Approval** option for the **Default Subcontractor Claim Approval Method for New Subcontracts**.

   ‣ From the **Period** section, select the **Require serial approval signatures on progress claim** option**.**

   See the Subcontract Settings and Period Settings   topics for more information on these and other subcontract and period-related project settings.

3) *Create a document set*.

   A document set includes the documents you expect a Subcontractor to sign while submitting their billing documents. These documents, at minimum, include a progress claim and an unconditional statutory declaration, but you can also require conditional statutory declarations and sworn statements. You can assign a unique document set to individual subcontracts.

   In order to use the serial signatory approval method, the documents chosen for your document sets must allow multiple approval signatures.

4) *Assign a document set*.

   If a Subcontractor is required to submit documents which differ from the project's default document set, use the **Assign Document Sets** page to select and assign an available document set to the organisation.

5) Set up a conditional approval rule.

   Conditional approval rules tell the application how to approach claim approval based on set criteria. A progress claim from a contract assigned to an approval group is routed to the assigned group instead of the default Approvers on the project.

   When the number of signatory approvers required to approve a progress claim for a specific contract is greater than the number of approvers required for default project documents, you will need to create a conditional approval rule to ensure your document and signing order are compatible with one another.

> **Note:** Only default Approvers are assigned on the **Manage Project Users** page. Default approval cannot be modified on the **Project Approval Rules** page.