

Oracle
**Textura Payment Management
Subcontractor Supplier Tracking Guide**

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Oracle Textura Payment Management Subcontractor Supplier Tracking Guide

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The Oracle logo, consisting of the word "ORACLE" in white, uppercase, sans-serif font, centered within a solid red rectangular background.

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Supplier Tracking Guide for Subcontractors

Overview

You can use the Supplier Tracking feature in Textura Payment Management (TPM) to add and track Diversity, Equity, and Inclusion (DEI) values that apply to your organization or your Sub-Tier organization. In this guide, you will learn how to:

- ▶ Submit DEI values for your organization.
- ▶ Resubmit DEI values if your General Contractor has rejected the previous values
- ▶ Add DEI values and certificates on behalf of your Sub-Tiers.
- ▶ View and edit DEI values submitted by your Sub-Tiers.
- ▶ Track organization that have not submitted DEI values.
- ▶ View organizations with expired certificates.

Watch this **Supplier Tracking for Subcontractors**

https://players.brightcove.net/2985902027001/default_default/index.html?videoId=6337438694112 video to view how Subcontractors and Sub-Tiers can submit diversity values.

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)

Submitting your Organization's Diversity Values

You can select the Diversity, Equity, and Inclusion (DEI) values and submit certifications for the DEI categories/values that are applicable to your organization. If your General Contractor is tracking DEI values for a project, a compliance task is displayed on the **Project Home** page and the **Tasks** page. You can also add, modify and delete the DEI values from the **My Organization Profile** page.

The DEI values you entered will automatically be used in future project programs that are set up by your General Contractor.

Notes:

- Only Enterprise Administrators can add or update DEI values.
- You will receive a compliance task 90 days before your organization's supplier tracking value is set to expire. Select the task and follow

steps 2 to 5 to submit your organization's diversity value and certificate for your General Contractor to approve. The task remains open for 90 days or until you complete the task.

- 1) Select the **Submit project program diversity values** task from the **Project Home** page or the **Tasks** page. If you do not see a compliance task, navigate to the **My Organization Profile** page and select the **Manage Values** button from the **Supplier Tracking Values** section.
A **Supplier Tracking** pane opens on the right side of the page.
- 2) From the **Supplier Tracking** pane, select all applicable diversity statuses for your organization.
- 3) Select **Continue**.
- 4) When prompted, add certification documentation for each diversity value.
 - a. From the section for a diversity status in need of a certification document, select the **Attach Documentation** 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 **Submit**.
 - ▶ The **Supplier Tracking** panel closes.
 - ▶ The **My Organization Profile** page shows how many diversity statuses you assigned to your organization.

Tip:

Select the **Add or remove values** link on the Supplier Tracking pane to add or remove DEI values.


Resubmitting your Diversity Values or Certificate

You will receive a task to resubmit program qualification values or certificate if your General Contractor has rejected your submission.

Note: You will receive a compliance task to update certificate/documentation Start Date field, if you submitted a diversity value with a certificate/documentation in you Organization profile prior to October 8, 2023

- 1) Select the **Submit project program value qualifications** task from the **Project Home** page or the **Tasks** page. A **Supplier Tracking** pane opens on the right side of the page.
- 2) From the **Supplier Tracking** pane, view the rejected value and the reason for the rejection.
- 3) Select **Continue**.
- 4) When prompted, add certification documentation for each diversity value.
 - a. From the section for a diversity status 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 **Submit**.
 - ▶ The **Supplier Tracking** panel closes.
 - ▶ Your General Contractor will receive a task to review your submission.

Tips:

- ▶ Select the **Add or remove values** link on the Supplier Tracking pane to add or remove DEI values.
- ▶ Select the  **Download** button to view the attached certificate.

Using the Supplier Tracking Page

From the **Supplier Tracking** page, you can view a list of all Sub-Tier organizations working on a project and their Diversity, Equity and Inclusion (DEI) status and certificate. From this page you can:

- ▶ Add a DEI value on behalf of your Sub-Tier organization.
- ▶ Attach DEI certificates for Sub-Tier organization.
- ▶ Track organizations that have not yet submitted their DEI values.
- ▶ View organizations with expired certification.
- ▶ View DEI values submitted by your Sub-Tier organization.

Watch this **Supplier Tracking for Subcontractors**

https://players.brightcove.net/2985902027001/default_default/index.html?videoId=6337438694112 video to view how Subcontractors and Sub-Tiers can submit diversity values.

Working with the Supplier Tracking Page for Subcontractors and Sub-Tiers

The screenshot shows the Oracle Textura Payment Management interface. At the top, there's a navigation bar with the Oracle logo, 'Textura Payment Management', and user information 'Anthony Martinez'. Below this are project-specific navigation items like 'Lincoln School' and '003 - Concrete and Masonry'. The main section is titled 'Supplier Tracking' and contains a search box, a table with columns for 'Organization', 'Approved Values', and 'Earliest Expiration Date', and an 'Actions' column. A red box highlights the 'All' and 'Pending Submission' tabs, and another red box highlights the 'View' button in the 'Actions' column.

- 1) **Search Box:** Enter to search for a specific organization.
- 2) **All, and Pending Submission Tabs:**
 - ▶ **All:** Displays all supplier organizations associated with a project.
 - ▶ **Pending Submission:** Displays organizations that have not yet submitted their DEI values.
- 3) **Actions Column:** Displays either the **View** or the **Edit** button.
 - ▶ **View Button:** Select to view an organization's DEI certificate and value.
 - ▶ **Edit Button:** Select to assign or update an organization's DEI value.
- 4) **Approved Values Column:** Displays the DEI values that have been approved for an organization.
- 5) **Earliest Expiration Date Column:** 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.
- 6) **Status Indicator (Not displayed):** 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.

Viewing and Editing Sub-Tier Supplier Tracking Values


You can view and edit the values submitted by your Sub-Tiers from the **Supplier Tracking** page.

- 1) **Navigate to the Supplier Tracking Page for Subcontractors** (see page 9)
- 2) Use the **All** or **Pending Submission** tabs to either view all Sub-Tier submissions or view a filtered list of Sub-Tier organizations that haven't submitted their values.
- 3) Select the **View** button from the **Actions** column to view the submitted values.
- 4) Select **Edit** button from the **Actions** column. The **Edit** action button is displayed only if the sub-tier has not submitted at least one diversity value to the General Contractor.

The **Supplier Tracking** pane is displayed.

- 5) From the **Supplier Tracking** pane, select all applicable diversity statuses for your organization.
- 6) Select **Continue**.
- 7) When prompted, add certification documentation for each diversity value.
 - a. From the section for a diversity status in need of a certification document, select the **Attach Documentation** 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.
- 8) Select **Submit**.

Tips:

- ▶ Select the **Add or remove values** link on the Supplier Tracking pane to add or remove DEI values.
- ▶ Select the  **Download** button to view the attached certificate.

Submitting Diversity Values for your Sub-Tiers

You can select Diversity, Equity, and Inclusion (DEI) values for your sub-tiers ((LWOST, Manual and On-system) if you have Project Manager or Compliance Manager roles on a project.

If you have received a compliance task to enter the diversity values for your sub-tiers, you can select the task from the **Project Home** or **Tasks** page. You can also use the **Supplier Tracking** page to add, edit, or delete diversity values on behalf of your sub-tiers.

Note: You will receive a compliance task 90 days before your sub-tier organization's supplier tracking value is set to expire. Select the task and follow steps 2 to 5 to submit your sub-tier's diversity value and certificate for your General Contractor to approve. The task remains open for 90 days or until you complete the task.

To submit diversity values on behalf of your Sub-Tiers:

- 1) Navigate to the **Supplier Tracking** page from either a project task or from the **Compliance** drop-down menu.
 - ▶ From a project task: Select the **Submit project program value qualifications for subtiers** task from the **Project Home** page or the **Tasks** page. A **Supplier Tracking** pane opens on the right side of the page.
 - ▶ From the **Compliance** drop-down menu:

- a. From the **Project Home** page, select the **Compliance** drop-down menu, and choose **Supplier Tracking**.
- b. Select the **Edit** action next to the sub-tier you want update. The **Edit** action button is displayed only if the sub-tier has not submitted at least one diversity value to the General Contractor.

The **Supplier Tracking** pane is displayed.

- 2) From the **Supplier Tracking** pane, select all applicable diversity statuses for your organization.
- 3) Select **Continue**.
- 4) When prompted, add certification documentation for each diversity value.
 - a. From the section for a diversity status in need of a certification document, select the **Attach Documentation** 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 **Submit**.
 - ▶ The **Supplier Tracking** panel closes.
 - ▶ The **Edit** button on the **Supplier Tracking** page changes to **View** as there are no more pending actions.

Tip:

Select the **Add or remove values** link on the Supplier Tracking pane to add or remove DEI values.

Viewing Organizations with Expired Certificates

- 1) **Navigate to the Supplier Tracking Page for Subcontractors** (see page 9).
- 2) From the **Supplier Tracking** page, use the **Earliest Expiration Date** column to view the date an organization's DEI certificate is due to expire. If there are multiple certificates, the earliest date is displayed in the column.

Tracking Organizations with Pending Submission

To view organizations that have not submitted their DEI values:

- 1) **Navigate to the Supplier Tracking Page for Subcontractors** (see page 9).
- 2) From the **Supplier Tracking** page, select the **Pending Submission** tab.

Navigate to the Supplier Tracking Page for Subcontractors

From the **Compliance** menu at the top of any project page, select **Supplier Tracking**.

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