Oracle
Textura Payment Management
Subcontractor Variation Management

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Contents

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Variation Management

Variations are changes to the scope of work originally specified in the contract and are used in Textura to adjust the total value of your contract for a project. Typically, both your organisation and the Head Contractor can create variations. When a Head Contractor uses the **Allow Subcontractors to Request Variations** project setting, you can submit variation requests to increase or decrease your contract value.

If you are a Prime Subcontractor with Sub-Tiers working for you on a project and the Sub-Tier holds a contract and enters their billing information on TPM, you can create a Sub-Tier variation to change their contract value. For more information on acting as a Prime Subcontractor, see *Sub-Tier Variation Management for Prime Subcontractors*.

Your Variations

Variations change the value of your organisation's contract value on TPM. These are displayed on the **My Variations** tab and are created or approved by the Head Contractor organisation.

Variations you requested but the Head Contractor has not yet approved only appear in the **Variation Register.**

High-Level Overview

If your Head Contractor does not use the **Specified WB** setting, you will complete the following workflow:

1) The Head Contractor creates a variation to adjust your contract value.
2) As a Project Manager, when you next log in and navigate to the **Project Home** page, you will see an **Edit Work Breakdown** task.

    At this time, the Work Breakdown is out of balance because the new variation needs to be allocated. It will remain out of balance until you allocate the variation.
3) Select the **Edit Work Breakdown** task to go to the **Allocate Variation** page.
4) Either *allocate the variation to an existing line item or create a new line item* in your WB. Enter the variation amount in the **Allocate** column and save your changes.

Variation Register

The system makes keeping track of variations simple by providing full visibility into a complete record of all variations submitted against your contract. The **Variation Register** allows Subcontractors to see any variations that have been submitted or added by the Head Contractor, their assessment status as well as submitted and approved values.

Contract details can be viewed without leaving the **Variation Register**. Use the contract drop down to select which contract's variations to display. Sub-Tier variations can also be viewed via the register.

The **Variation Register** provides a comprehensive breakdown of each variation – including assessment details – in an easy-to-read table format.

Requesting Variations

As a Subcontractor, use the request variations feature to notify the Head Contractor of variations to your contract as they arise on site. Variations can be requested at any time of the month, often resulting in approved variations well before your claim is submitted.

To request a variation, use the **Request Variations** tab of the **Variations** page.

Once created and approved, your requested variation will display on the **Variations** page.
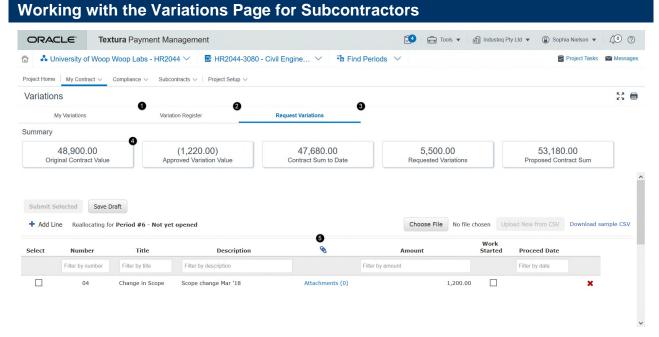
High-Level Overview

If your Head Contractor enables variation requests on a project, you will complete the following workflow:

1) If you need to adjust the total value of your contract, *request a variation* from the **Variations** page.

2) The Head Contractor receives the requested variation and either approves or rejects it.
   ‣ The Head Contractor can either approve the full amount you requested or a different amount.
   ‣ If the Head Contractor rejects the variation request, you will see the variation on your **Variation Register** with a status of **Rejected**. At this point, you can submit a new request.

3) If you have control of your Work Breakdown and the Head Contractor does not oversee the budget on your behalf, you will need to *allocate the variation*.

FAQs

Adding a variation with your claim (see page 17)

What happens to my usage fee when I have a variation? (see page 17)

Working with the Variations Page for Subcontractors

1) **My Variations Tab**: View variations that have been assessed and added to your contract
2) **Variation Register**: View a complete record of all variations and requests on your contracts. Select a contract from the **Contract** drop-down to select which contract variations to display. You can view these contract details without leaving the **Variation Register** tab. Additionally, you can view Sub-Tier variations.

   The **Variation Register** tab also includes a link to the **View WB** page.
3) **Request Variations**: Submit variation requests to the Head Contractor. Either manually enter a variation request, or upload a CSV file.
4) **Summary Tiles**: Easily compare your original contract value to the sum of your current contract with variations added. On the **My Variations** tab, see the original and current value of your contract alongside assessed variations. The **Variation Register** tab displays variation and contract sum values for a specified subcontract. Use the tiles on the **Variation Request** tab to see totals for your unsubmitted variation requests.
5) **Variations Table**: See variation details for the selected view. Use the filters at the top of the table to narrow the list of entries.

Navigate to the Variations Page

- From the **My Contract** menu at the top of any project page, select the **My Variations** link.
- If you are a Prime Subcontractor with an on-system Sub-Tier Subcontractor working for you, select the **Subcontract Variations** link from the **Subcontracts** menu at the top of any page to go to the **Subcontract Variations** tab of the **Variations** page. You can only access the page in this way if you have Sub-Tiers with a contract on the application.

Filtering and Sorting on the Variation Register Tab

There are a number of ways to organise and filter variations in the **Variation Register** tab:

▸ **Filter/Search Boxes:** The fields in the grey row above each column can be used to search for and filter specific variations

Type a value or piece of text you would like to search for/filter by into the corresponding box and press enter to filter

▸ **Sorting:** Variations can be sorted from A to Z, by date or value

  ▸ Click on any of the headings to sort them in alphabetic/numeric order

  ▸ To toggle between highest-lowest and lowest-highest, click the heading a second time
  For example: To sort variations from highest approved value to lowest, click the **Approved Value** heading

▸ **Switching between pages:** By default, ten variations are displayed per page

  ▸ If you cannot see a particular variation that has been submitted, check other pages

  ▸ To flip between pages, use the arrow buttons at the bottom right hand corner of the page; alternatively, increase the **Number of Records** shown by using the drop-down box in the bottom-left.

Generating a Variation Register Report as a Subcontractor

As a Subcontractor, you can view the variation register across your project and subcontracts by generating the **Variation Register Report**. It shows the variations that are assigned to you and the variations that have been approved/rejected for your Subcontractors.

To generate a **Variation Register Report** from the **Variation Register** tab:

1) *Navigate to the Variations Page* (see page 6).
2) Select the **Variation Register** tab.
3) From the **Variation Register** tab, select the **Generate Report** link from the **Reporting** icon.
   A **Status** page displays.
4) From the **Status** page, select the **here** link.
   The **View Reports** page displays. A link to the generated report displays in the table.

Requesting Variations

You can request a variation to increase or decrease your contract value on a project.

To request a variation:

1) From the **Enter Billing Details** page, use the **More** drop-down menu to select **Request Variations**. You can also access the **Request Variations** page from the **My Contract** menu.
2) From the **Request Variation** dialogue box, enter a number, title, and description for the variation request. These are all required fields.

  ▸ Number: An identifying number for the variation request

  ▸ Title: A heading for the variation request

  ▸ Description: Details of the works covered under the variation request

3) Optional. Upload a variation attachment.
4) Enter a monetary value to request a change to your budget.

5) Optional. Select the **Work Started** tick box to indicate your organisation already commenced the corresponding works.

6) Optional. Enter a date to reflect the starting date of the works.

   This field only appears if you select the **Work Started** tick box.

7) Optional. Select the **Add Line** button and repeat steps 2 through 6 if you need to request multiple variations in the same session.

8) Tick the **Select** box to the left of each variation.

9) Select the **Submit Selected** button to send your variation request to the Head Contractor for assessment.

   ‣ Once you submit a variation, it cannot be edited.

   ‣ If you are not ready to submit your variation request, you can select the **Save Draft** button. Your entries are saved and you can return to edit them later.

   ‣ If you already have your variation recorded in an Excel spreadsheet, you can upload it directly.

   Variations can be uploaded from comma-separated value (CSV) files. This is useful if there are multiple variations to submit which have been recorded externally in an Excel spreadsheet. See topic Uploading Variations from a CSV.

Uploading Variations from a CSV

To upload a variation from a CSV file:

1) *Navigate to the Variations Page* (see page 6).

2) Select the **Download Sample CSV** link to download a template of the format your variations must follow.

   If your variations are recorded in another Excel workbook, simply copy and paste the data into the template.

3) Complete the following:

   ‣ **Number:** Your internal variation number

   ‣ **Title:** A heading to identify the variation

   ‣ **Budget Amount:** The total value of the variation

   ‣ **Description:** A summary of the works/materials covered by the variation

   ‣ Optional. **Work Started:** Indicates whether the corresponding works have commenced

   ‣ Optional. **Proceed Date:** Indicates the starting date of the works. A proceed date is required if the **Work Started** field is marked as **Y**.

   You will need to complete all required fields in a row that has data in it – the system will not accept files with incomplete records. When complete, save the file as a CSV to your computer.

   > **Note:** Do not add dollar signs ($) or special characters to the **Budget Amount** column. Doing so will result in an error when uploading the file.

4) Select **Choose File** to browse your computer for the saved CSV. Open the file from the explorer window and select **Upload New from CSV**. Your variations will automatically fill in the **Request Variation** page, ready to be submitted.

See Request Variations Tab.

Sub-Tier Variation Management for Prime Contractors

As a Subcontractor working on a Head Contractor's project on TPM, you may need to hire and track the work of Sub-Tier Subcontractors. A Sub-Tier Subcontractor either performs work for your organisation or provides supplies.

Though rare, there are instances where you might need to track a Sub-Tier Subcontractor's billing through TPM and require the Sub-Tier Subcontractor to submit a progress claim each claims period. To allow a Sub-Tier Subcontractor to claim through TPM, you will create a subcontract for the organisation. This is similar to the contract shared between your organisation and your Head Contractor. After you create a subcontract for a Sub-Tier Subcontractor, your organisation will take on the role of a Prime Subcontractor.

If at a later time you need to adjust the value of the the Sub-Tier Subcontractor's subcontract, you can either increase or decrease it with a Sub-Tier variation. The following topics explain how to create and delete these Sub-Tier variations on TPM.

Subcontract Variations

As a Prime Subcontractor organisation, create subcontract variations (SV) to change the contract value of a Sub-Tier subcontract.

After creating the SV, the application generates an email for the Sub-Tier as a reminder to edit the WB to allocate the variation. The Sub-Tier WB will be out of balance until the variation is allocated.

Keep the following in mind:

▶ Any modification to Sub-Tier subcontract totals requires the creation of a SV.
▶ Each Sub-Tier subcontract to be modified requires a separate SV.
▶ SVs that create a new component will automatically allocate the new component to the Sub-Tier's WB.
▶ SVs that change existing components will require the Sub-Tier to allocate the variation. If you chose to use the Specified WB setting for a Sub-Tier's contract, you will allocate the variation instead of the Sub-Tier because you have control of the Sub-Tier's budgeting on TPM.
▶ Adjustments for each separate variation are made independently of one another (not at the same time). The system displays variations one-at-a-time on the **Allocate Variation** page.

See *Creating Sub-Tier Subcontract Variations* in the online help or in this guide for detailed instructions.

Creating Sub-Tier Subcontract Variations

To create a Sub-Tier Variation (SV):

1) *Navigate to the Variations Page* (see page 6).
2) Select the **Subcontract Variations** tab.
3) From the **Subcontract Variation** tab, select the **Add...** button.

An **Add Subcontract Variation** dialogue box displays.

4) In the dialogue box, choose a contract from the drop-down and select the **Next** button.

The dialogue box closes and the **Contract Maintenance** page displays.

5) From the **Contract Maintenance** page, select the **Variation** button.

A dialogue box displays.

6) In the dialogue box, enter information in all available fields.

7) Optional. Select the **Hidden Variation** option to modify the **Original Work Breakdown** and **Contract Sum to Date** columns in the Sub-Tier Work Breakdown.

Hidden variations:

▶ Do not appear in the **Net change by Variation** column.

▶ Are not identified as a variation-related value on progress claims documents

▶ Cannot be un-hidden later.

8) Select **Save Changes**.

The dialogue box closes and the **Contract Maintenance** page shows the **Variations** tab.

9) The table on the page includes:

▶ A **Variation created in Session** button with the variation amount

▶ A **Variation Adjustment** column displayed in red.

10) Optional. Add a new line if the variation includes work not itemised in the contract.

a. Select the **Add New Component** button.

A new line appears.

b. Select the **Item** column for the new line, and then select the **Find** button.

A dialogue box displays.

c. In the dialogue box, select the **Owner WB** component to link to the subcontract cost code.

The dialogue box closes, and the **Item** and **Description** fields automatically display information pulled from the selected Owner WB component. You can change the description.

d. Enter a **Subcontract Item**.

11) In the **Variation Adjustment** column, enter the amount to pay the Sub-Tier for each line impacted by the variation.

▶ SVs that create a new component automatically allocate the new component to the Sub-Tier WB (as a single line item).

▶ SVs that change existing components require a Sub-Tier to allocate the variation.

▶ The total displayed under the **Variation Adjustment** column must match the total amount of the variation.

12) Select **Save Changes**.

▶ A **Status** page confirms the contract changes have been saved.

▶ The application sends an email to Project Managers in the Sub-Tier organisation, informing them that a variation was added.

▶ A task to allocate the variation displays on the Sub-Tier **Project Home**, **Period Home**, and **Tasks** pages.

▸ If the contract uses the **Specified WB** setting, you will allocate the subcontract variation in place of the Subcontractor. You will see a project task and receive an email prompting you to allocate funds.

▸ If you created the variation in error, you can delete it before it is allocated.

Deleting Sub-Tier Variations

To delete an unallocated Sub-Tier variation:

1) *Navigate to the Variations Page* (see page 6).

2) In the line for the variation, select the **Delete** button.

   A dialogue box displays.

3) From the dialogue box, select the **Yes** button.

   The variation disappears from the table and a **Success** message displays at the top of the page.

> **Missing a delete button?** A Textura representative will need to delete the variation. ***Contact Oracle Support https://docs.oracle.com/cd/E97085_01/10313339.htm***.

Allocate Variations as a Subcontractor

As a Subcontractor, use the **Variation Allocation** page to adjust your Work Breakdown (WB) with the variation amounts assigned by the Head Contractor.

The page shows:

▸ How many variations need to be allocated

▸ Which variation is being allocated on the current page

▸ The period context (which claims period is impacted by the variation allocation).

It also includes an **Allocate** column with the variation amount.

You can only allocate one variation at a time. If a contract has more than one variation awaiting allocation, the next variation will display on the **Allocate Variation** page after you allocate and save the first one.

After you allocate all outstanding variations, a **Status** page confirms the variations have been allocated.

Navigate to the Variation Allocation Page

When a Head Contractor creates a variation that needs to be allocated, an **Allocate Variations** message appears on the **Project Home** page for all Subcontractors.

There are two ways to see the **Allocate Variations** page.

▸ Use the **Required: Edit Work Breakdown** link in the **Contract** tasks section.

▸ Choose the **Edit Work Breakdown** link under the **My Contract** menu of at the top of any project page.

Allocating a Variation

The **Allocate Variation** page shows one variation at a time. If a contract has more than one variation, the next variation will display on the **Allocate Variation** page after you save the first one.

To allocate a variation amount on the **Allocate Variation** page:

1) *Navigate to the Variation Allocation Page* (see page 11).
2) On the **Allocate Variation** page, enter an amount in the **Allocate** column for each line impacted by the variation. When you complete an entry, the amount displays in the **Net Change By Variation** total.
   ▸ When the **Working Total** in the **Allocate** column equals the **Total**, the allocation is complete.
   ▸ The **Working Total** amount matches the amount in the **Allocate** column heading.
3) Optional. Add an additional line.
   a. Select the **Add New Line** button to add an additional line to the Work Breakdown for the variation.
   b. In the **Allocate** column for the new line, enter the variation amount you would like to allocate.

   > **Note:** The new line also requires an **Item Number** and **Description**.

4) Select **Save Changes**.
   A **Status** page confirms you allocated the variations.

Additional Variation Information

The topics in this section explain how to manage variation documents. They also list and explain the table fields you may see on the **Variations** page.

Uploading a Variation Document

To upload a variation document:

1) *Navigate to the Variations Page* (see page 6).
2) In the line for the variation to upload a document to, select the paper clip icon.
   An **Upload Files** dialogue box displays.
3) In the dialog box, select the ellipses **(...)** button and choose a file to upload. You can choose to upload either one or several documents.
4) Enter a description for the document.
   This description applies to all documents uploaded to the dialog box.
5) Select the **Upload** button.

The document displays in a table within the dialog box.

6) Optional. Use the **Actions** drop-down to classify or declassify the document.

The classify option applies to all documents uploaded to the dialogue box.

7) Select the **Close** button.

The dialogue box closes and the number of attached documents displays next to the paper clip icon on the **Variations** page.

Viewing an Uploaded Variation Document

To view an uploaded variation document:

1) *Navigate to the Variations Page* (see page 6).

2) In the line for the variation with a document to view, select the paper clip icon.

An **Upload Files** dialogue box displays.

3) From the **Upload Files** dialogue box, select the file name of the document.

A dialogue box displays.

4) In the dialogue box, either select a program to open the document or save the document.

5) Select the **OK** button.

The document either opens or saves to your computer.

Variation Fields Overview for Subcontractors

Subcontract

The number of the Sub-Tier subcontract the variation will affect. Select the subcontract number in a table row to go to the **Contract Status** page for the related subcontract. This column only displays on the **Subcontract Variations** tab.

Subcontractor

The name of the Sub-Tier organisation on the application. This column only displays on the **Subcontract Variations** tab.

Number

Either the number a Head Contractor assigned to a variation for your contract, or the number you assigned to a variation for a Sub-Tier subcontract. On the **Subcontract Variations** tab, select the number in a table row to edit a variation. You cannot update the variation amount by this method. This column displays on both the tab for your variations and the tab for your Sub-Tier variations.

Title

Either the name a Head Contractor gave to a variation for your contract, or the name you gave to a variation for a Sub-Tier subcontract. The name can contain letters, numbers, and special characters. On the **Subcontract Variations** tab, select the name in a table row to edit a variation. You cannot update the variation amount by this method. This column displays on both tabs.

Description

Further detail about what the variation includes. This column displays on all tabs.

Period

The period in which the variation takes effect. This column displays on all tabs.

Created Date

The date you or the Head Contractor added the variation on the application. This column displays on all tabs.

Variation Date

The reference date of the variation. This column displays on all tabs.

Amount

A positive or negative monetary change applied to the contract. This column displays on all tabs.

Hidden

States if a variation is hidden. This column displays on all tabs.

Paper Clip Icon (Attachments)

Shows the number of attachments linked to a variation. Select the icon to upload or view an uploaded document. This column displays on all tabs.

Trash Can Icon (Delete)

Delete a variation. This column displays only displays on the **Subcontract Variations** tab.

Variation Register Tab Fields for Subcontractors

Summary Tile Fields

Original Contract Sum

The value of the subcontract as it was originally entered or imported into the system.

Approved Variations

The value of all variations that have been approved against the contract.

Contract Sum to Date

The total value original contract value plus any approved variations.

Requested Variations

The value of all variations that have been requested but have not been assessed by the Head Contractor yet.

Proposed Contract Sum

The total value of the original contract and all variations, regardless of their status.

Request Data Fields

Sequence

Displays the order in which each variation was submitted.

Period

Shows which Billing Period the variation was submitted in.

Number

The variation reference number.

Title

A short heading for the variation.

Description

A summary of the works covered under the variation.

Attachments

Displays the number of attachments associated with each variation; click the number in brackets to view/download attachments. Head Contractors and Subcontractors can upload attachments, but they can only be deleted by the organisation that uploaded them.

Submitted Date

The date the variation was requested.

Submitted Amount

The overall variation amount requested.

Unapproved Claims

Current claimed amounts against unapproved variations.

Assessment Data Fields

Approved Value

The amount approved by the Head Contractor against each variation. This may not always match the **Submitted Value**.

Status

Displays the current approval status of each variation:
- **Approved:** The variation has been approved and the value of your contract has been adjusted by the **Approved Value.**
- **Rejected:** The variation has been rejected and cannot be claimed against. Rejected variations will display as lines worth $0 on the WB.
- **Submitted:** The variation is still pending Head Contractor approval. Submitted variations can still be claimed against.

Variation

The variation number entered by the Head Contractor.

Adding a variation with your claim

As part of the progress claim submission process, Subcontractors can submit variations on their contracts and claim against them.

To add a new variation:

1) From the **Enter Billing Details** page, select the **Add Variations**.

2) Enter details in the fields provided:
   ‣ **Number**: An identifying number for the variation request
   ‣ **Title**: A heading for the variation request
   ‣ **Description**: Details of the works covered under the variation request
   ‣ **Attachments**: Optional. Add relevant files to the variation assessment, such as work orders or site photos
   ‣ **Work Started**: Optional. Denotes whether the works covered under the variation request have commenced
   ‣ **Proceed Date**: Optional. A reference date for the variation request

3) To submit additional variations, select **+Add Line**.

4) Use **Select** to choose which variations to include in this current claim, then select the **Submit Selected** button to confirm the details. Each individual variation will appear in the progress claim.

5) To claim against your variations, select a **Submitted Variation** and enter a value in either the **% Complete** or **Work This Period** column.

> **Notes:**
> - Once submitted, variations and their values cannot be edited by your organisation. You are still required to claim against submitted variations when entering billing details.
> - You can also submit or review your variation register from the **My Contract** menu at the top of any project page. From the menu, select **Request Variation**.

What happens to my usage fee when I have a variation?

Usage fees on Textura are based on your contract value. When you are responsible for paying your own fees, you will receive a refund if your contract value decreases by 25% or more. If a variation increases your contract value by 25% or more, you will need to pay the difference between your previous usage fee and new usage fee based off this new value. These two scenarios are called **Fee Events**.

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