

Sneak Peek: Interactive Floorplans and ContractorHub





Introductions



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Eric brings 19 years of technology experience including 14 years of CMMS experience, 3 years of building management experience, and 3 years of validation and verification testing. He has successfully implemented CMMS solutions for over 40 clients. Eric supported Chicago Public Schools as a dedicated TMA admin resource for almost 2 years. He has trained 1000s of users from technicians to Administrators. He helped standardized PMs, created and monitored performance metrics and national KPIs, helped create hundreds of reports, and developed hundreds of personalized dashboards. Eric and his team now support over 40 clients, providing them training, video and documentation resources, custom reports, custom dashboards, and helped save them countless hours with their expertise.



Introductions



JOE MCVAY | Senior Director of Solutions Engineering

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Joe McVay has served in various roles at TMA Systems including Senior Implementation Consultant, Product Manager, and is now the Director of Solutions Engineering. Joe has over 14 years of experience in CMMS and EAM applications spanning verticals such as Higher Education, Healthcare, Public Sector, and Manufacturing.

Joe is responsible for leading technical demonstrations of our product offerings and assisting our Engineering department with new development initiatives.



Agenda

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01. How do you currently manage work completed by contractors or vendors?

- a. Email, phone, or manual updates
- b. Separate system
- c. Limited visibility in CMMS
- d. Fully integrated and tracked
- e. Not applicable

ContractorHub



The ContractorHub revolutionizes work order management by offering vendors a simplified platform to update and monitor assignments.

The screenshot displays the ContractorHub interface. At the top, there is a blue navigation bar with a grid icon, 'File', 'Transactions', a star, an info icon, and a user profile icon. Below the navigation bar, the page title 'Contractor Hub' is shown. On the left, there is a sidebar with three main sections: 'WORK ORDERS' (with sub-items 'Work Orders Summary' and 'Work Order Tasks'), 'ACTIVE TASKS' (with sub-items 'Tech Filter', 'Due Date Breakdown', and 'Active Task List'), and 'MANAGE TECHS' (with sub-item 'Contractor Technicians'). The main content area features a 'Work Orders Summary' section with four colored boxes: 9 Open (black), 5 Overdue (red), 0 Finished (green), and 4 Unassigned (teal). Below this is a 'Work Order Tasks' section with a table of tasks. The table has columns for checkboxes, WO#, filters, REQUEST, LOCATION, ZONES, ITEM, and expand icons. The tasks listed are:

<input type="checkbox"/>	WO#	Filters	REQUEST	LOCATION	ZONES	ITEM	Expand
<input type="checkbox"/>	PP-9962531	IP CO	2	Install new air conditioner Replace Heater	FACILITY Main Campus	Plumbing Zone 1	GROUP AC1 All Air Conditioners
<input type="checkbox"/>	PP-9962567	IP WO	3	It is way too hot in here!	BUILDING Administration Building	Plumbing Zone 1, Custodial Zone 01, Zone 1, Plumbing Zone 1, Zone 5	NOT FOUND
<input type="checkbox"/>	PP-9963828	IP WO	3	Temperature issue	BUILDING Administration Building	Plumbing Zone 1, Custodial Zone 01, Zone 1, Plumbing Zone 1, Zone 5	NOT FOUND
<input type="checkbox"/>	PP-9964507	- WO	3	Too hot in this room A/C Is Too	BUILDING Administration Building	Plumbing Zone 1, Custodial Zone	NOT FOUND



Benefits of the ContractorHub

SIMPLIFIED INTERFACE

ContractorHub offers an intuitive portal design, reducing barriers for vendor adoption. By eliminating complex username/password requirements and the need to download a specific app, it simplifies access and enhances efficiency for contractors.

MOBILE-FRIENDLY PAGES

The interface is optimized for mobile devices, allowing contractors to easily update work order statuses and manage tasks on-the-go. This mobile-friendly design ensures adaptability for fieldwork situations.

ONBOARDING TECHNICIANS

Vendor managers have the capability to onboard new contractors efficiently. This feature supports managing work assignments directly within the platform, enhancing delegation and tracking processes.



Benefits of the ContractorHub

STATUS UPDATES

The module facilitates seamless communication between vendors and facility managers by requiring regular updates on task progress. This ensures transparency and real-time tracking of the work order lifecycle.

ADMINISTRATIVE BURDEN

Managing a high volume of work orders performed by third-party vendors can become a significant administrative task. ContractorHub reduces this burden by empowering vendors to update work orders themselves.

COMMUNICATION GAPS

Facility Managers often face gaps in scheduling and status communication with vendors. ContractorHub bridges these gaps with required status updates, ensuring work completion transparency.

Interface – Active Tasks



The ContractorHub Active Tasks tab displays more information about work order tasks assigned to your company and includes additional action buttons.

The screenshot shows the Contractor Hub interface. The left sidebar contains three main sections: WORK ORDERS (with sub-items Work Orders Summary and Work Order Tasks), ACTIVE TASKS (with sub-items Tech Filter, Due Date Breakdown, and Active Task List), and MANAGE TECHS (with sub-item Contractor Technicians). The main content area is titled 'Contractor Hub' and features a 'Tech Filter' dropdown menu set to 'All tasks...'. Below this is a 'Due Date Breakdown' section with a donut chart showing 5 Open tasks and six colored boxes representing: 1 Overdue (red), 0 Today (orange), 0 Next 7 Days (green), 0 After 7 Days (teal), and 4 No Due Date (grey). The 'Active Task List' section displays two task cards. The first card, PP-9962531, is for 'Install new air conditioner' and 'Replace Heater' at 'Main Campus', due on 07/12/2024, assigned to Joe McVay and Jasmine Siong. The second card, PP-9962567, is for 'It is way too hot in here!' at 'Administration Building', with no due date, assigned to Joe McVay. Each task card includes a set of action buttons (refresh, add, refresh, chat, print, share, checkmark, link).



Interface – Manage Techs

The ContractorHub Manage Techs tab allows for the creation and management of the contractors technicians that will be performing tasks in the system

The screenshot displays the Contractor Hub interface. At the top, there is a breadcrumb navigation: [Home](#) / Contractor Hub. The main heading is "Contractor Hub".

On the left side, there is a sidebar menu with three sections:

- WORK ORDERS**
 - Work Orders Summary
 - Work Order Tasks
- ACTIVE TASKS**
 - Tech Filter
 - Due Date Breakdown
 - Active Task List
- MANAGE TECHS**
 - Contractor Technicians

The main content area is titled "Contractor Technicians" and features a blue "+" button in the top right corner for adding new technicians. Below this, there is a list of three active technicians, each with their name, status, contact information, and action buttons:

Name	Status	Email	Phone	Actions
Joe McVay	ACTIVE	joe.mcvay@tmasystems.com	1213235324	Edit, Link, Delete
Jenny Pino	ACTIVE	jenny.pino123@tmasystems.com	123-456-7890	Edit, Link, Delete
Jasmine Siong	ACTIVE	jasmine.siong@tmasystems.com		Edit, Link, Delete



02.

Where do you experience the biggest challenges with contractor work today?

- a. Lack of visibility into work status
- b. Communication delays with vendors
- c. Manual updates and admin effort
- d. Tracking accountability and performance
- e. No major challenges



Contractor Roles and Benefits

The structured distinction between Manager and Technician roles ensures streamlined operations. Contractor Managers handle administrative oversight, while Technicians ensure task completion. This segmentation optimizes workflow and enhances collaboration efficiency.



CONTRACTOR MANAGER

The Contractor Manager, also known as the Vendor Manager, is a named and licensed user within ContractorHub. This role provides vendors with the ability to manage assignments as well as onboard additional team members. Contractor Managers ensure efficient delegation of tasks and oversee workflow progress.



CONTRACTOR TECHNICIAN

Contractor Technicians are individuals linked to a contractor's record but do not hold permanent user roles. These team members gain access to ContractorHub through temporary hyperlinks that expire after 24 hours. They focus directly on task execution, providing updates, and marking assignments as completed.



ContractorHub FAQs

01

Is Contract Management required to use ContractorHub?

No, ContractorHub operates independently but complements Contract Management.

02

What access is included in the base purchase?

The base module provides access for one Contractor Manager

03

How are additional licenses sold?

Additional Contractor Manager licenses come in bundles of five.

Email Templates for ContractorHub



x Email Template Entry

Transaction Type

Event

Keyword

To

Subject

Contractor Tech Assigned

Contractor Tech Un-Assigned

Send Contractor Tech Work Order Task Link

Send Contractor Tech Work Order Task List Link

Send Refreshed Contractor Task Link

Suppress

Live Demo





03. How do you currently visualize assets or work across your facilities?

- a. We don't have a visual tool today
- b. Static maps or PDFs
- c. Separate CAD system
- d. Within our CMMS (limited)
- e. Not sure



04.

If you had interactive floorplans today, what would be the most valuable use case for your team?

- a. Locating assets quickly
- b. Visualizing open work orders
- c. Planning and scheduling maintenance
- d. Supporting technicians in the field
- e. Space / occupancy insights



05. Which of these would deliver the most value to your team?

- a. Visualizing work and assets on floorplans
- b. Managing contractor work in one system
- c. Both equally valuable
- d. Neither

Questions

Thank you

