

## Overview & Application:

### 2.0 CONTRACTORS

- To register and certify individual contractors/vendors by completing a Contractor Sign-up form (2.1).
- To upload a list of contractor information for registration/certification at a later time but prior to work order acceptance (2.2).
- To view contractors sorted by site name and/or number (2.3).
- To add/upload contractor-related documents such as Certificates of Insurance, Business Licenses, etc. (2.4).
- To register and certify individual sub-contractors by completing a Contractor Sign-up form (2.5).
- To add/upload sub-contractor-related documents such as Certificates of Insurance, Business Licenses, etc. (2.6).
- To view sub-contractors sorted by site name and/or number (2.7).
- To set up permissions for a sub-contractor's name or phone number to be listed in the work order/paperwork (2.7).

The screenshot displays four overlapping screenshots of the WorkOasis web application interface. The top-left screenshot shows the 'Contractor Sign-up Form' with fields for Business Name, Contact Name, Address, City, State (dropdown), Zip, Phone, Email, Password, and Scope of Services (dropdown). The top-right screenshot shows the 'Import Contractor List' screen with a text area for instructions and a 'Browse...' button to upload a CSV file. The bottom-right screenshot shows the 'Add Document' screen with a dropdown for Contractor, fields for File Name, File Description, and File, and an 'Upload Document' button. The bottom screenshot shows the 'View Current Contractors' screen with a table of contractor data.

Contractor Name	Contractor Phone	Contractor Email	Service Category	Service Rating	Date Assigned	Status	Action
Abarca Janitorial	6784059605	brodriguez@workoasis.com	Janitorial		5/31/2007	Active	Unassign Contractor

2.0 Contractor dashboard and views

## Contractors

- 2.1 Register
- 2.2 Import Contractors
- 2.3 View Contractors
- 2.4 Contractor Documents
- 2.5 Register Sub-Contractors
- 2.6 Import Sub-Contractors
- 2.7 View Sub-Contractors
- 2.8 Edit Permissions

The screenshot shows the WorkOasis web application interface. At the top left is the WorkOasis logo with a palm tree icon. At the top right is the tagline "Connecting People, Process and Technology™". Below the logo is a navigation menu with tabs for Dashboard, Contractors, Sites, Service Requests, Work Orders, Scheduled Maint., Invoices, Energy Mgt., RFP's, Notes, Reports, Admin, Customer Service, and Logout. The "Contractors" tab is selected, and a dropdown menu is open showing options: Register, Import Contractors, View Contractors, Contractor Documents, Register Sub-Contractors, Import Sub-Contractors, View Sub-Contractors, Edit Permissions, and Help. To the right of the menu is a search bar with a dropdown menu set to "H-E-B Grocery Stores" and a "Quick Search" button. Below the navigation is a table with three columns: Report, Status, and Action. The table contains data for various reports, including "New Service", "Open Service", "New Work O", "Open Work", "Open Invoic", "Contractors", "Average Service Rating", "Average MTTR Rating", and "Average Cost Rating". Below the table are four notification sections: "Service Request Notifications", "Work Order Notifications", "Invoice Notifications", and "RFP Notifications". At the bottom right, there are links for "Terms Of Use", "Privacy", and "Refund Policy", along with a copyright notice for 2004 WorkOasis.

Report	Status	Action
New Service	Currently (55 new service requests)	<a href="#">View</a>
Open Service	Currently (116 open service requests)	<a href="#">View</a>
New Work O	Currently (102 new work orders)	<a href="#">View</a>
Open Work	Currently (18 open work orders)	<a href="#">View</a>
Open Invoic	Currently (41 open invoices)	<a href="#">View</a>
Contractors	Currently (18 contractors)	<a href="#">View</a>
Average Service Rating	1.9	
Average MTTR Rating	7 Days 22 Hours	
Average Cost Rating	\$97.42	

Expand All | Collapse All

Service Request Notifications  
 Work Order Notifications  
 Invoice Notifications  
 RFP Notifications

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## 2.1 Register

To receive a work order, a contractor must be registered as a certified supplier in the system.

The screenshot shows a web application interface for contractor registration. At the top, there is a navigation menu with tabs: Dashboard, Contractors, Sites, Service Requests, Work Orders, Scheduled Maint., Invoices, Energy Mgt., RFP's, Notes, Reports, Admin, Customer Service, and Logout. A dropdown menu on the right shows 'H-E-B Grocery Stores'. Below the navigation is the title 'Contractor Sign-up Form ...' and a 'Translate into' dropdown. The main content area is titled 'Short Form Registration' and contains the following fields:

- Business Name:
- Contact First Name:
- Contact Last Name:
- Address:
- City:
- State:
- Zip:
- Phone:
- Email:
- Email (confirm):
- Password:
- Password (confirm):
- Scope Of Services:   
Administrative  
Air and Water Filtration  
Air Duct Cleaning  
Alarm Monitoring
- Geographic Coverage:   
ALABAMA  
Alabama - Anniston  
Alabama - Auburn  
Alabama - Bessemer

At the bottom left, there is a 'Continue' button. Below the Geographic Coverage dropdown, there is a note: 'Press and hold the control button to select multiple areas'.

### 2.1.a Completed contractor sign-up form (short form)

The registration application requests insurance information that includes carrier, policy, expiration date and coverage level for three categories of insurance:

- General liability
- Automobile
- Workers' compensation

Proof of general liability, automobile and workers compensation insurance must be emailed, faxed or uploaded within 30 days of initial registration. The contractor will be automatically alerted of upload document requirements upon sign-in or opening a work order if insurance documentation is incomplete or expired.

Contractors can register by:

1. Clicking register on the toolbar of the WorkOasis™ home page.
2. By receiving an electronic invitation from the admin/client, which includes a link to the registration application.
3. By faxing a registration application, insurance documentation and credit card information to the WorkOasis™ technical support team at (404) 506-9108 / fax.

**To register**

1. Click **Register** from drop-down menu.
2. Click **Short Form Registration**.  
Required information:
  - Business Name
  - Contact First Name
  - Contact Last Name
  - Address
  - City
  - State
  - Zip
  - Phone
  - Email (contractor will enter email twice to confirm)
  - Password (contractor will enter password twice to confirm)
  - Scope of Services
  - Geographic Coverage
3. Click **Continue** to go to Page 2 – Compliance Laws, Acts and Standards.
4. Accept a compliance by checking the box after each section.
  - OSHA
  - EPA
  - EEOC
  - Employment Laws and I-9 Verification
  - Patriot Act
5. Click **Back** to return to previous page OR click **Finish** to go to Page 3 – Process Payment.
6. Enter credit card information.
7. Click **Pay Now** to complete registration.

Translate into

## Contractor Sign-up Form (3 of 3) ...

**Process Payment**

**We currently accept Visa, Mastercard and American Express**

Promotional Code:

- OR -

Amount to charge: \$75.00

Name on card: First:   
Last:

Card number:

Expiration date:

Company Name:

Billing Address:

Billing City:

Billing State:

Billing Zip:

Billing Phone:

**2.1.b Payment page**

8. A **Sign Up Completed** page will appear with the newly-registered contractor's username and password. Contractor will use this to access his/her dbase to upload required insurance documents and licenses, to receive and complete dispatched work orders and to generate and send invoices. The system auto-generates and sends an email notification to the account administrator and contractor, advising both of the newly registered vendor.

**Sign Up Completed**

You have completed the registration process. Your user information is displayed below.

Your new username is: **brodriguez@workoasis.com**

Your new password is: **nocula**

*Enter your new username and password to the left to login.*

**2.1.c Registration confirmation page**

## 2.2 Import Contractors

For users with contractor permissions, a CSV (Comma Separated Value) file with the list of contractors to be registered can be uploaded into the system.

### To import (upload) contractors

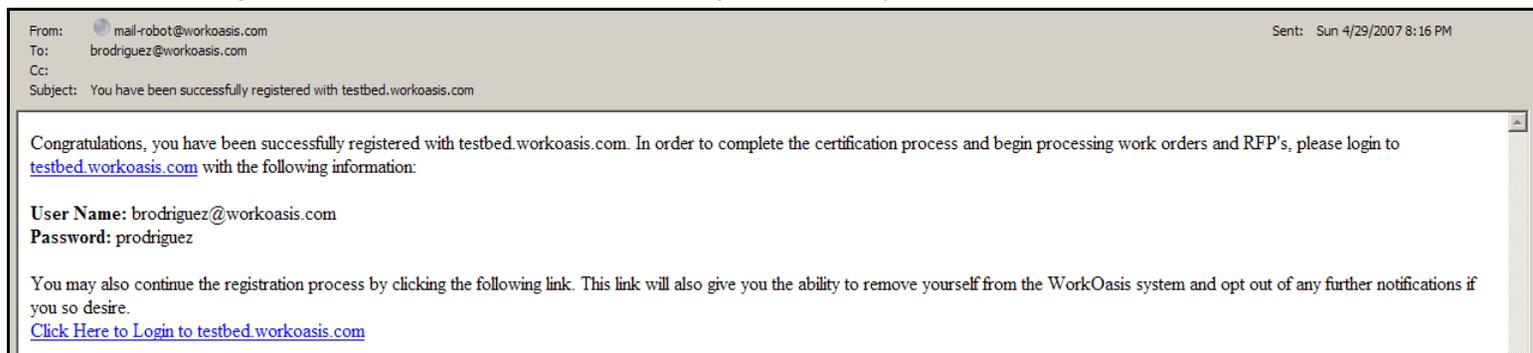
1. Click **Import Contractors** from drop-down menu.
2. Click **Sample Contractor CSV File** link (in blue).



The screenshot shows a web interface titled "Import Contractor List". At the top right, there is a "Translate into" dropdown menu and a "Quick Search" button. Below the title, there is a blue header bar. The main content area contains the following text: "Please use this screen to upload a CSV (Comma Separated Value) file with the list of contractors you wish to register. You can use the following file, [Sample Contractor CSV File](#), as a guide for the required CSV file format." Below this text, there is an "Import File:" label, a text input field, and a "Browse..." button. At the bottom of the form, there is a dark blue button labeled "Import Contractors".

#### 2.2.a Import contractor upload manager

3. You will be redirected to a CSV file. Complete all columns. Go to **File / Save As / Name the file** to save the contractor csv file.
4. When asked if you want to keep the workbook in this format, click **Yes**. Remember where the file was saved.
5. Click the browser **Back** button. When asked **Do you want to save changes?**, click **No**.
6. You will be redirected back to the Import Contractor List.
7. Click **Browse**. Find and click on the file. Click **Open**.
8. Click **Import Contractors**. The contractor information is then uploaded into the dbase.
9. Upon registration or CSV upload, contractor will receive an email notification with username and password. At this point, the final part of registration which is certification and payment is not yet complete.



The screenshot shows an email notification. The header includes: "From: mail-robot@workoasis.com", "To: brodriguez@workoasis.com", "Cc:", and "Subject: You have been successfully registered with testbed.workoasis.com". The date and time are "Sent: Sun 4/29/2007 8:16 PM". The main body of the email contains the following text: "Congratulations, you have been successfully registered with testbed.workoasis.com. In order to complete the certification process and begin processing work orders and RFP's, please login to [testbed.workoasis.com](#) with the following information:" followed by "User Name: brodriguez@workoasis.com" and "Password: prodriguez". At the bottom, it says: "You may also continue the registration process by clicking the following link. This link will also give you the ability to remove yourself from the WorkOasis system and opt out of any further notifications if you so desire." followed by a blue link: "[Click Here to Login to testbed.workoasis.com](#)".

#### 2.2.b Email notification received by vendor after first step of registration or upon import/upload contractor csv file

Before the contractor can accept and process work orders, and participate in any WorkOasis-related processes, the contractor must complete the WorkOasis™ certification process and payment. There is a yearly \$75.00 fee for participating in this network of contractors.

**To complete certification and payment**

1. Go to the customer site (refer to #9) noted on the email notification (not [www.workoasis.com](http://www.workoasis.com)) and using the newly-assigned user name and password, log into the site.



2.2.c Login screen, where user name and password are required for contractor to complete certification.

2. Click **Proceed** to continue with insurance/license documentation upload and payment. Click **Certify Later** to continue certification and payment at a later time. Click **Remove me as a Supplier** to cancel registration and to be deleted from the WorkOasis™ vendor dbase.



**2.2.d To proceed to registration/certification completion**

3. Click **Proceed** and enter insurance information.
4. Click **Proceed to Step 3**.
5. Accept OSHA, EPA, EEOC, Employment Laws and I-9 Verification and Patriot Act compliance by checking the box after each section.
6. Click **Finish**.
7. Enter credit card information to complete registration/certification.
8. Click **Pay Now**.
9. A **Sign Up Completed** page appears with the newly-registered contractor's username and password.
10. Click **Click here to return to the task you were originally trying to accomplish** to be redirected to the dashboard.

### 2.3 View Contractors

View current contractors by individual site, contractor name, service category, service rating, date assigned to site and status.

To search for a specific contractor, enter a contractor name in the **Search** bar. Click **Go** for a list of sites the selected contractor is assigned to by default or not.

Go to **Site Name** and select a site from the drop-down for a list of contractors who have completed work in that given site.

Unassign a contractor to a site if the contractor should no longer be utilized in that given site.

#### To unassign a contractor

1. Click **Unassign Contractor**.
2. A pop-up **Warning! Proceeding will remove the selected contractor from the assigned list** will appear. Click **Ok**.

The screenshot shows the WorkOasis Contractor Manager interface. At the top, there is a navigation menu with options like Dashboard, Contractors, Sites, Service Requests, Work Orders, Scheduled Maint., Invoices, Energy Mgt., RFP's, Notes, Reports, Admin, Customer Service, and Logout. The current site is 'Boston Market'. Below the navigation, there is a search bar for 'View Current Contractors' and a 'Site Name' dropdown set to 'RadioShack HQ'. The main content area displays a table of 13 records found, with columns for Contractor Name, Contractor Phone, Contractor Email, Service Category, Service Rating, Date Assigned, Default Contractor, Status, and Action. The table lists various contractors such as 'ABC Refrigeration' and 'Hobart Equipment Service' with their respective details and an 'Unassign Contractor' link for each.

Contractor Name	Contractor Phone	Contractor Email	Service Category	Service Rating	Date Assigned	Default Contractor	Status	Action
ABC Refrigeration	210 675 3342	jsmith@fmsolutionsllc.com	Baler, Compactor, Dumpster Service	3	10/4/2006	Yes	Active	<a href="#">Unassign Contractor</a>
ABC Refrigeration	210 675 3342	jsmith@fmsolutionsllc.com	Janitorial	3	10/4/2006	Yes	Active	<a href="#">Unassign Contractor</a>
ABC Refrigeration	210 675 3342	jsmith@fmsolutionsllc.com	Glass Repair and Replacement	3	10/4/2006	Yes	Active	<a href="#">Unassign Contractor</a>
ABC Refrigeration	210 675 3342	jsmith@fmsolutionsllc.com	HVAC Services	3	10/4/2006	Yes	Active	<a href="#">Unassign Contractor</a>
ABC Refrigeration	210 675 3342	jsmith@fmsolutionsllc.com	Lighting Interior	3	10/4/2006	Yes	Active	<a href="#">Unassign Contractor</a>
ABC Refrigeration	210 675 3342	jsmith@fmsolutionsllc.com	Lighting Exterior	3	10/4/2006	Yes	Active	<a href="#">Unassign Contractor</a>
ABC Refrigeration	210 675 3342	jsmith@fmsolutionsllc.com	Locks/Keys/Safes	3	10/4/2006	Yes	Active	<a href="#">Unassign Contractor</a>
ABC Refrigeration	210 675 3342	jsmith@fmsolutionsllc.com	Painting (Interior)	3	10/4/2006	Yes	Active	<a href="#">Unassign Contractor</a>
ABC Refrigeration	210 675 3342	jsmith@fmsolutionsllc.com	Plumbing	3	10/4/2006	Yes	Active	<a href="#">Unassign Contractor</a>
ABC Refrigeration	210 675 3342	jsmith@fmsolutionsllc.com	Waste Collection	3	10/4/2006	Yes	Active	<a href="#">Unassign Contractor</a>
ABC Refrigeration	210 675 3342	jsmith@fmsolutionsllc.com	General Maintenance	3	10/4/2007	No	Active	<a href="#">Unassign Contractor</a>
ABC Refrigeration	210 675 3342	jsmith@fmsolutionsllc.com	Electrical	3	12/11/2007	No	Active	<a href="#">Unassign Contractor</a>
Hobart Equipment Service	535 455 5545	gstenger@workoasis.com	Kitchen Equipment	3	10/4/2006	Yes	Active	<a href="#">Unassign Contractor</a>

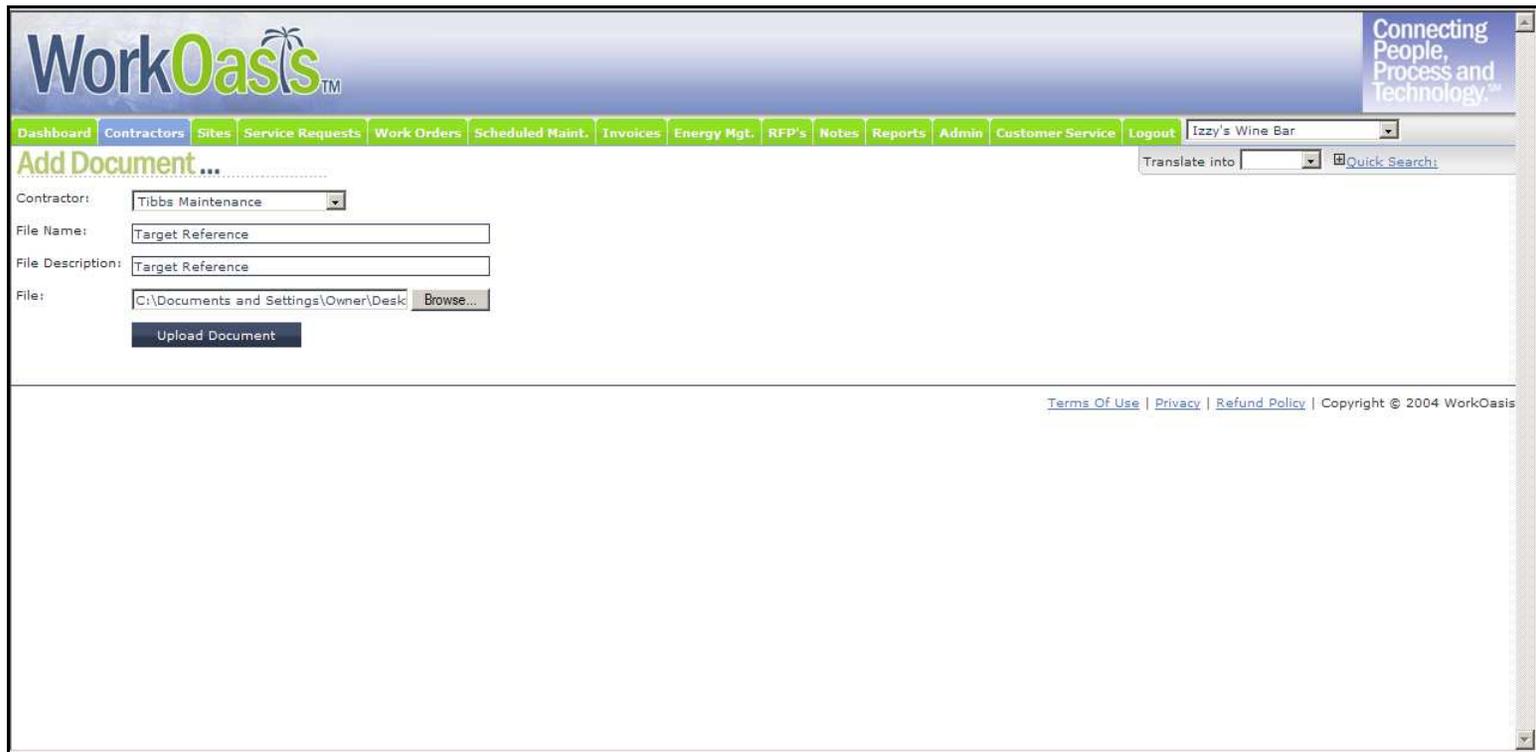
2.3 List of default and non-default contractors by site

## 2.4 Contractor Documents

You can add documents and images corresponding to an individual contractor.

### To add contractor-related documents

1. Click **Contractor Documents** from drop-down menu.
2. Select Contractor from drop-down menu.
3. Enter a File Name.
4. Enter a File Description.
5. Click **Browse** to upload a document.
6. Click **Upload Document** to save document.



The screenshot shows the WorkOasis web application interface. At the top left is the WorkOasis logo. A navigation bar contains links for Dashboard, Contractors, Sites, Service Requests, Work Orders, Scheduled Maint., Invoices, Energy Mgt., RFP's, Notes, Reports, Admin, Customer Service, and Logout. A dropdown menu is open over the Contractors link, showing 'Izzy's Wine Bar'. Below the navigation bar is the 'Add Document ...' form. The form includes a 'Contractor:' dropdown menu with 'Tibbs Maintenance' selected, a 'File Name:' text input field with 'Target Reference', a 'File Description:' text input field with 'Target Reference', and a 'File:' text input field with 'C:\Documents and Settings\Owner\Desktop' and a 'Browse...' button. An 'Upload Document' button is located below the file input field. In the top right corner, there is a 'Translate into' dropdown menu and a 'Quick Search' button. At the bottom right of the page, there are links for 'Terms Of Use', 'Privacy', and 'Refund Policy', along with a copyright notice: 'Copyright © 2004 WorkOasis'.

2.4 Add/upload contractor-related documents

## 2.5 Register Sub-Contractors

3<sup>rd</sup> Party Management Companies register Sub-Contractors who perform work through WorkOasis™.

### To register sub-contractors

1. Click **Register Sub-Contractors** from drop-down menu.
2. Select **Parent Contractor Name** from drop-down menu.
3. Enter the following information:
  - Sub-Contractor Business Name
  - Phone Number
  - Address, City, State, Zip
  - Contact First Name, Contact Last Name
  - Email (contractor will enter email twice to confirm)
  - Password (contractor will enter password twice to confirm)
  - Scope of Services
  - Geographic Coverage
4. Click **Complete Registration**

The screenshot shows a web form titled "Sub-Contractor Registration". The form contains the following fields and values:

- Parent Contractor Name: Tibbs Maintenance (dropdown menu)
- Sub-Contractor Business Name: Atlanta Repairs (text input)
- Phone Number: 404.992.5647 (text input)
- Address: 4371 Winters Chapel Road (text input)
- City: Atlanta (text input)
- State: GA (dropdown menu)
- Zip: 30035 (text input)
- Contact First Name: Lucy (text input)
- Contact Last Name: Baumberger (text input)
- Email: lbaumberger@yahoo.com (text input)
- Email (confirm): lbaumberger@yahoo.com (text input)
- Password: [masked with dots] (text input)
- Password (confirm): [masked with dots] (text input)
- Scope Of Services: Vending, Waste Collection, Water Treatment Services, Window Washing, Wood Refinishing (list box with scroll bar)
- Geographic Coverage: California - San Jose, California - San Juan Capistrano, California - San Mateo, California - San Rafael, California - Santa Ana (list box with scroll bar)

Below the list boxes, there are instructions: "Press and hold the control button to select multiple areas".

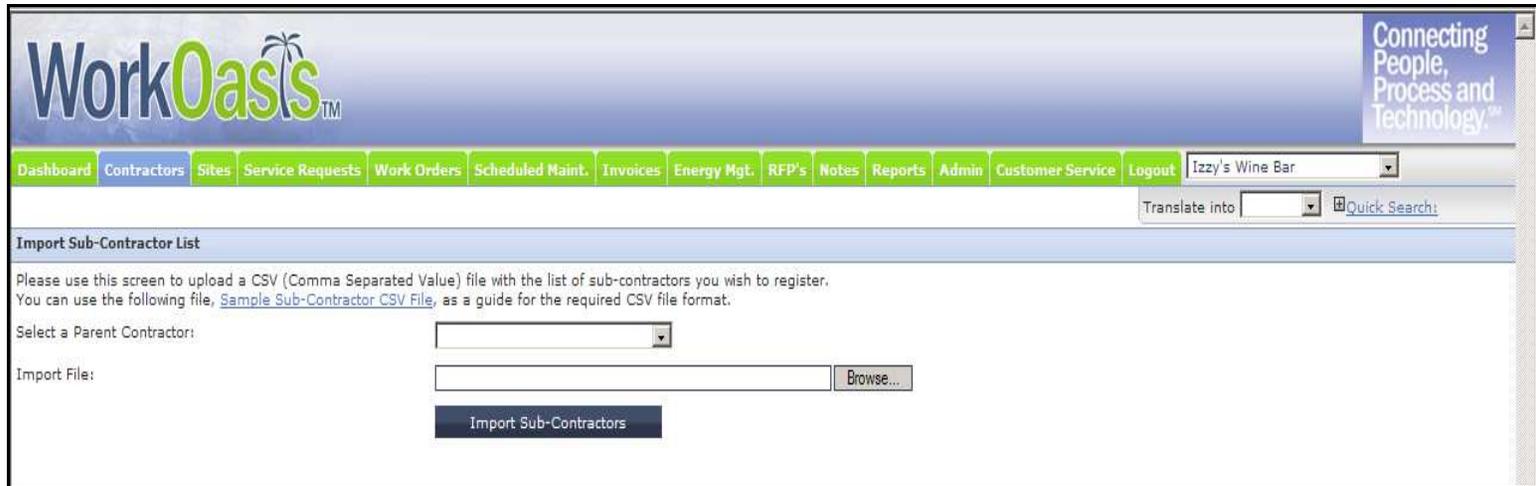
2.5 Completed contractor sign-up short form

## 2.6 Import Sub-Contractors

For users with contractor permissions, a list of sub-contractors can be uploaded for registration into the system via a CSV (Comma Separated Value) file.

### To import (upload) sub-contractors

1. Click **Import Sub-Contractors** from drop-down menu.
2. Click **Sample Sub-Contractor CSV File** link (in blue)



*2.6.a Import contractor upload manager*

3. You will be redirected to a CSV file. Complete all columns. Go to **File / Save As / Name the file** to save the sub-contractor csv file.
4. When asked if you want to keep the workbook in this format, click **Yes**. Remember where the file was saved.
5. Click the browser **Back** button. When asked **Do you want to save changes?**, click **No**.
6. You will be redirected back to the Import Sub-Contractor List.
7. Click **Browse**. Find and click on the file. Click **Open**.
8. Click **Import Sub-Contractors**. The contractor information is then uploaded into the dbase.
9. Upon registration or CSV upload, the sub-contractor will receive an email notification with username and password. At this point, the final part of registration which is certification and payment is not yet complete.

## 2.7 View Sub-Contractors

To search for a specific sub-contractor, enter a sub-contractor name in the **Search** bar. Click **Go** for that sub-contractor's information. Click on sub-contractor's name and be directed to his profile.

Go to **Select a Parent Contractor** and select a parent contractor from the drop-down for a list of this parent contractor's sub-contractors.

WorkOasis™ Connecting People, Process and Technology.™

Dashboard Contractors Sites Service Requests Work Orders Scheduled Maint. Invoices Energy Mgt. RFP's Notes Reports Admin Customer Service Logout Barb's Dbase

View Current Contractors ... Translate into Quick Search:

Sub-Contractor Manager

Search:  Go

Select a Parent Contractor: APC HVAC Services

Previous Page: 1 of 1 Next Results Per Page: 30 2 Records Found

Contractor Name	Contractor Phone	Contractor Email	Service Category	Service Rating	Date Assigned	Default Contractor	Status	Action
<a href="#">Deni's Heat &amp; AC</a>	678.403.0294	<a href="mailto:brodriguez@workoasis.com">brodriguez@workoasis.com</a>				No	Active	<a href="#">Unassign Contractor</a>
<a href="#">Heat Leaders</a>	503.504.2093	<a href="mailto:brodriguez@workoasis.com">brodriguez@workoasis.com</a>				No	Active	<a href="#">Unassign Contractor</a>

Previous Page: 1 of 1 Next Results Per Page: 30 2 Records Found

2.7 List of sub-contractors by parent contractor search

Unassign a sub-contractor to a site if the sub-contractor should no longer be utilized in that given site.

### To unassign a Sub-Contractor

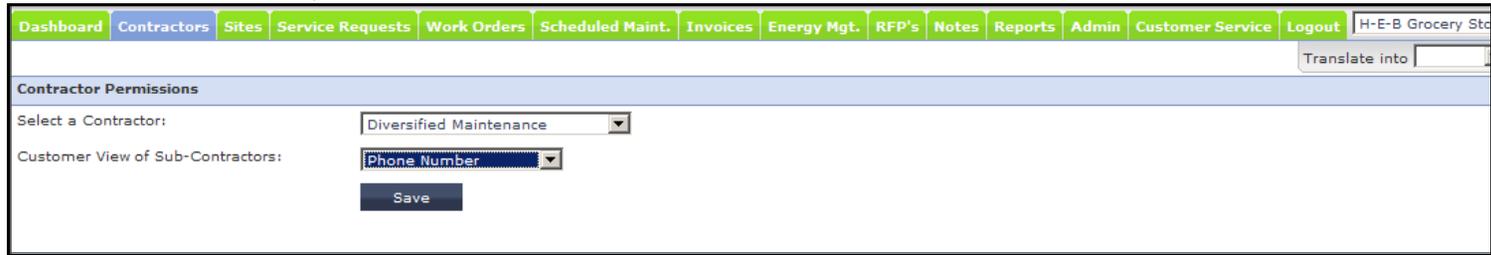
1. Click **Unassign Sub-contractor**.
2. A pop-up **Warning! Proceeding will remove the selected contractor from the assigned list** will appear. Click **Ok**.

## 2.8 Edit Permissions

3<sup>rd</sup> Party Management Companies' who register all sub-contractors who perform work for them through WorkOasis™ have the option to make visible or hide the name or phone number of a sub-contractor they dispatch a work order to. By default, the sub-contractors are hidden.

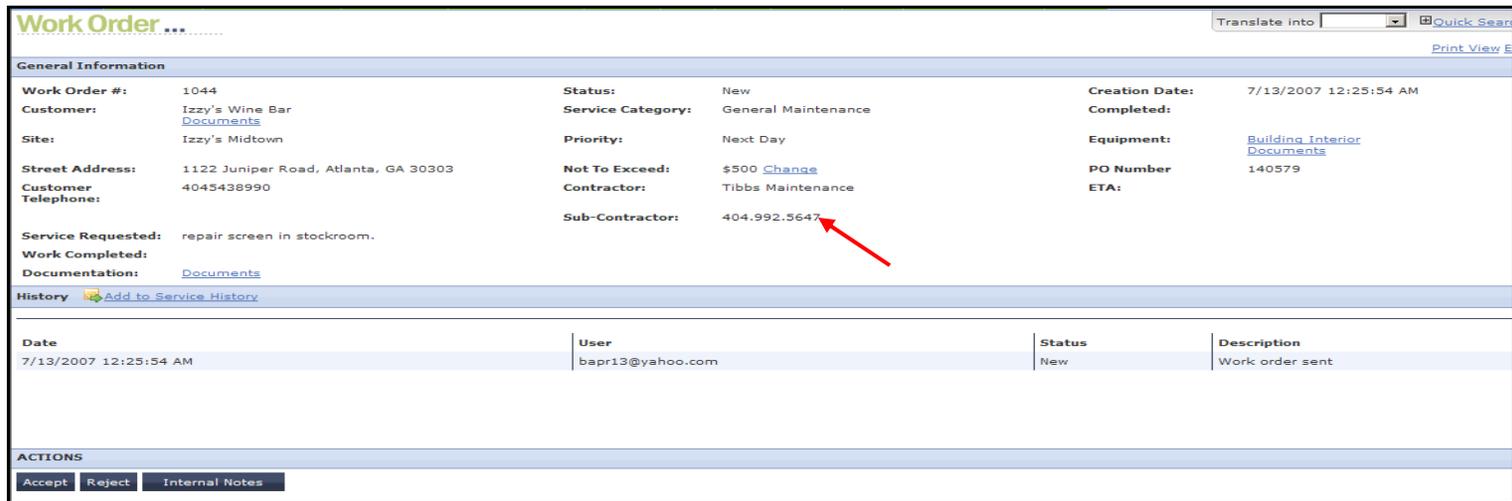
### To make visible a sub-contractor's name or phone number in the work order header

1. Click **Edit Permissions**.
2. Click on **Select a Contractor** drop-down menu and select a contractor whose sub-contractor base to edit.
3. Click on **Customer View of Sub-Contractors** drop-down menu and select **Display Name** to show the sub-contractor's name in the work order; select **Display Main Number** to show the sub-contractor's main office telephone number; select **Display Cell Number** to show the sub-contractor's cell number, select **Display Fax Number** to show the sub-contractor's fax number; select **None** if sub-contractor information is to remain hidden. Click **Save**.



The screenshot shows the 'Contractor Permissions' form in the WorkOasis system. At the top, there is a navigation bar with tabs for Dashboard, Contractors, Sites, Service Requests, Work Orders, Scheduled Maint., Invoices, Energy Mgt., RFP's, Notes, Reports, Admin, Customer Service, and Logout. Below the navigation bar, there is a 'Translate into' dropdown menu. The main form area is titled 'Contractor Permissions' and contains two dropdown menus: 'Select a Contractor:' with 'Diversified Maintenance' selected, and 'Customer View of Sub-Contractors:' with 'Phone Number' selected. A 'Save' button is located below the second dropdown menu.

#### 2.8.a Select show sub-contractor's phone number in work order



The screenshot shows the 'Work Order' details page. At the top, there is a navigation bar with tabs for Dashboard, Contractors, Sites, Service Requests, Work Orders, Scheduled Maint., Invoices, Energy Mgt., RFP's, Notes, Reports, Admin, Customer Service, and Logout. Below the navigation bar, there is a 'Translate into' dropdown menu and a 'Quick Search' button. The main form area is titled 'Work Order' and contains a 'General Information' section. The 'General Information' section is divided into two columns. The left column contains: Work Order #: 1044, Customer: Izzy's Wine Bar (with a link to Documents), Site: Izzy's Midtown, Street Address: 1122 Juniper Road, Atlanta, GA 30303, Customer Telephone: 4045438990, Service Requested: repair screen in stockroom., Work Completed: (with a link to Documents), and Documentation: (with a link to Documents). The right column contains: Status: New, Service Category: General Maintenance, Priority: Next Day, Not To Exceed: \$500 (with a link to Change), Contractor: Tibbs Maintenance, Sub-Contractor: 404.992.5647 (with a red arrow pointing to it), Creation Date: 7/13/2007 12:25:54 AM, Completed: (with a link to Building Interior Documents), PO Number: 140579, and ETA: (with a link to Documents). Below the 'General Information' section, there is a 'History' section with a link to 'Add to Service History'. The 'History' section contains a table with columns for Date, User, Status, and Description. The table has one row: Date: 7/13/2007 12:25:54 AM, User: bapr13@yashoo.com, Status: New, Description: Work order sent. At the bottom of the page, there is an 'ACTIONS' section with buttons for 'Accept', 'Reject', and 'Internal Notes'.

#### 2.8.b Work order reflecting sub-contractor's phone number only

Click **Contractors** >  Help for an overview & application, including step-by-step directions on contractor-related functions.