User Conference 2015 Training Guide

Use our Training Guide to find out exactly which sessions you should attend. Select the job position that best matches your own, and follow the sessions that coincide with your interests and level of experience to get the most value from UC2015.

Training Guide...

- **NI** Estimators–New & Intermediate
- **AE** Estimators–Advanced
- **FP** Project Managers, Superintendents, Foremen & Field Personnel
- **EX** Executive & Accounting
- **SP** Shop Managers & Shop Personnel
- **DS** Dispatchers

- **Hands-on Sessions** Each attendee will use a computer to walk-through training material.
- **Mobile App Content** These sessions will include content around our mobile tablet application.

# B2W ESTIMATE 101 SESSIONS

This hands-on track consists of eight sessions that will lead attendees through the B2W Estimate application from start to finish. These sessions are sequential in nature and each class builds on the skills learned in previous classes. This is an excellent track for clients who are new to B2W Estimate, or new hires who wish to come up to speed with B2W Estimate.

## Overview of B2W Estimate

In this session, your instructor will take you on a guided tour of the key areas within B2W Estimate. Attend this session to gain understanding of the element as a whole so that you're well prepared for the detailed sessions to follow!

**Monday, 9:45 a.m. - 11:00 a.m.**

## Resource Fundamentals

Every estimator knows it's impossible to create an accurate estimate without a trusted library of costing resources. In this session, your instructor will introduce you to B2W Estimate's powerful Resources area, where components such as labor types, equipment, and materials are developed for later use in your estimates.

**Monday, 11:15 a.m. - 12:30 p.m.**

## Creating Your First Estimate

In this session, your instructor will teach you about default settings that apply to new estimates you generate, and also lead you through the process of creating your first estimate. You'll learn how to configure basic estimate information and see firsthand how the resources and templates you learned about in previous sessions are copied into new estimates.

**Monday, 3:15 p.m. - 4:30 p.m.**

## Fine Tuning Your Estimate Costs

This session teaches you how to ensure that your estimate's cost structure accurately reflects the work that will be performed once the bid is awarded and the actual job begins. Examples include modifying crews to fit the needs of a specific estimate, calculating trucking costs, performing global edits, replacing one component with another, and developing indirect cost structures.

**Tuesday, 9:45 a.m. - 11:00 a.m.**

## Creating Useful Templates

Expanding on the previous session, your instructor will now guide you through the process of creating more advanced Resource cost structures such as crew, task, and item templates. Here, you'll learn how to create advanced cost structures, which form the basis of the estimates you'll be generating later on.

**Monday, 1:45 p.m. - 3:00 p.m.**

## Managing Your Subs and Vendors

In this session, you will learn all about the process of soliciting and analyzing third party quotes from subcontractors and vendors. Your instructor will guide you through the process of creating packages of similar work items and materials into an attractive request for quote (RFQ), entering and comparing the prices that are returned to you, entering last minute adjustments, and, ultimately, the process of making the best decision for your estimate.

**Tuesday, 11:15 a.m. - 12:30 p.m.**

**Continued...**
B2W User Conference 2015  
March 1-3, Bacara Resort, Santa Barbara, CA

B2W OPERATIONAL SUITE 101 SESSIONS

Closing Your Estimate  
Your instructor will now show you how to make the most of B2W Estimate’s powerful bid-closing engine, exploring a variety of easy-to-use features that help ensure your estimate generates the expected amount of markup, and that these dollars are properly distributed across pay items in the estimate. The skills you learn in this session will guarantee that the hard work you put into your estimate translates into numbers that will win you the job.  
Tuesday, 1:45 p.m. - 3:00 p.m.

Reports and Analysis  
This final session brings all of the pieces together by introducing the wide variety of reporting options at your disposal via both B2W Estimate and B2W Management Reporting. Here you’ll learn how to analyze information on-screen, print reports for specific scopes within your estimate, quickly locate the reports you use most often, and copy information into other formats for different types of analysis and delivery.  
Tuesday, 3:15 p.m. - 4:30 p.m.

Our second hands-on track focuses on the elements within the B2W Operational Suite: B2W Track, B2W Dispatch, and B2W Maintain. Special attention will be given to the B2W Mobile App, first from the perspective of a field employee, and then from that of a mechanic. This track is an excellent choice for field employees who are new to the B2W Operational Suite or Mobile App, or for those who simply wish to see firsthand how these solutions bring value to a business.

Overview of the B2W Operational Suite  
In this session, your instructor will take you on a guided tour of key areas within the B2W Operational Suite elements. Attend this session to gain an understanding of B2W Track, B2W Dispatch, and B2W Maintain, as both individual elements and three parts of a unified whole! This session will ensure that you’re well prepared for the detailed sessions to follow!  
Monday, 9:45 a.m. - 11:00 a.m.

Managing Needs and Assignments  
Your instructor will now guide you through exercises designed to streamline your dispatching process so that you always know where your employees and equipment resources are supposed to be, when they’re supposed to be there, and for how long. By the end of this session you’ll have a solid foundation for efficient resource management through setting up job sites, creating and fulfilling needs, and managing assignments.  
Monday, 3:15 p.m. - 4:30 p.m.

Security and Customization  
Here you’ll participate in exercises that demonstrate the process of customizing the B2W Operational Suite in order to meet your company’s specific needs. By focusing on custom properties, customizable field log layouts, business units, and security roles, this session provides you with an excellent understanding of how a well-organized and well-secured database pays dividends for years to come.  
Monday, 11:15 a.m. - 12:30 p.m.

Moving Equipment & Hauling Materials  
In this session, you’ll now learn how to ensure your equipment and materials are transported to the appropriate job sites in time for work to begin. You’ll learn how to assign trucks and drivers to your equipment moves so that you know your heavy equipment can mobilize to the appropriate locations in time, how to properly assign trucking resources to permanent material orders, and how to schedule loads for transporting temporary materials.  
Tuesday, 9:45 a.m. - 11:00 a.m.

The Foreman’s Perspective  
In this session, your instructor will demonstrate the process of creating field logs via your browser as well as the B2W Mobile App. Here you’ll see all of the day-to-day processes in action, including creating a field log from scratch, copying a field log from a previous day, adding employees and equipment, and assigning hours and material quantities. This session will prepare you for independent hands-on learning when you explore the dozens of iPad and Android devices set up for your use in our Solutions Center.  
Monday, 1:45 p.m. - 3:00 p.m.

Setup and Preventative Maintenance  
This session leads you through hands-on exercises that demonstrate how to configure your B2W Operational Suite database to best ensure an efficient rollout. In addition to learning ways to create and manage efficient categories and parts lists, these exercises will lead you through the process of setting up preventative maintenance programs and linking them to your equipment records.  
Tuesday, 11:15 a.m. - 12:30 p.m

Continued...
Repair Requests and Work Order Management
Our focus now shifts to day-to-day operations, such as creating repair requests – both from a browser and from the B2W Mobile App – and work orders. You’ll learn how to add work items to a work order, as well as how to plan and schedule the work order for completion. Finally, you’ll take part in exercises that walk you through the process of reviewing, approving, or rejecting time sheets.
Tuesday, 1:45 p.m. - 3:00 p.m.

The Mechanic’s Perspective
In this session, your instructor will demonstrate day-to-day operations from a mechanic’s point of view, using both an internet browser and the B2W Mobile App. You’ll see all the familiar processes in action, including interacting with scheduled work orders, entering time against work order items, completing items, and interacting with equipment. This session will prepare you for independent hands-on learning when you explore the dozens of iPad and Android devices set up for your use in our Solutions Center.
Tuesday, 3:15 p.m. - 4:30 p.m.

B2W ESTIMATE DEEP DIVES SESSIONS

Fine Tuning Your Labor Costs
Our first deep dive session for B2W Estimate sets its sights on the importance of trusting labor cost accuracy. You’ll learn how to ensure that your labor types, labor burdens, and labor rate classes are set up to work for you rather than against you. With a special focus on leveraging the new worker’s comp framework in B2W Estimate, this session will highlight recent enhancements that help you monitor, adjust, and trust the labor rates in your estimates.
Monday, 9:45 a.m. - 11:00 a.m.

Work Breakdown Structures
In this session, you’ll take a close look at how B2W Estimate’s WBS feature can add a whole new level of efficiency to your estimating process. You’ll learn about working with WBS Databases, including the process of importing and exporting levels of cost detail. Just as importantly, you’ll learn everything there is to know about creating WBS estimates, as well as hybrid estimates that make use of WBS cost detail alongside traditional pay items.
Monday, 11:15 a.m. - 12:30 p.m.

Market Analysis, Bid Schedules and Management Reports
This session focuses on “the big picture” by taking a closer look at B2W Estimate’s Market Analysis feature. By demonstrating a variety of ways powerful information can be brought to your attention, we’ll teach you how to analyze bid results and see how your estimate compares to competitor pricing, both at the estimate and pay item level. We’ll also introduce you to the new Bid Schedule feature, which brings a new level of awareness to your scheduled bid lettings and other planned events.
Monday, 11:15 a.m. - 12:30 p.m.

Embedded Excel Workbooks
In this session, you’ll learn the process of extending the power of B2W Estimate via Microsoft Excel workbook integration. You’ll learn how to create Excel workbooks for use within B2W Estimate, how to import workbooks into Resources, and how to manage and update Excel data within your estimates. Attend this session to see numerous examples of how Excel integration can be leveraged to save you valuable time and money.
Tuesday, 9:45 a.m. - 11:00 a.m.

Managing Your Materials
This session walks you through all the intricacies of one of B2W Estimate’s most feature-rich areas: Vendor Management. Highlights of this session include lessons on setting up permanent and temporary materials, using categories and subcategories properly, working with materials in Global Edits, dealing with partial quotes, splitting the assignment of an RFQ group across multiple vendors, and entering and distributing last minute vendor adjustments.
Tuesday, 11:15 a.m. - 12:30 p.m.

Continued...
B2W OPERATIONAL SUITE DEEP DIVES SESSIONS

Bid Closing Strategies
Our next deep-dive session focuses on B2W Estimate’s powerful bid closing engine. After a quick run through the core process, this session turns toward advanced bid closing techniques such as selective distribution of indirect items; the ability to impose unique markup schemes by work type, phase, or subcontractor; dealing with takeoff quantities; locking in item pricing; and the proper handling of contingency items.

Turning an Estimate into a Job
In our final B2W Estimate deep dive session, you’ll take a close look at the process of sending an awarded estimate to the B2W Operational Suite as the basis for new job. Here you’ll identify all the “touch points” and see how a wide variety of configurable export settings and coding options help you achieve nearly any level of granularity to best meet your company’s field tracking, dispatching and equipment maintenance needs.

Creative Use of Security Roles
Our first deep dive into the B2W Operational Suite teaches you how proper “behind the scenes” setup leads not only to an exceptionally smooth end-user experience, but also to accurately reporting information captured at the exact level of detail you wish to see. By centering on key entities such as Business Units and Security Roles, and with special attention to the new “ad-hoc” security role, this session will provide you with a deep understanding of how to best ensure that your data is properly secured, organized, and accessible.

Preventative Maintenance
In this session you’ll walk through the process of setting up preventative maintenance programs. You will learn how to create routines that automatically generate work items based on defined intervals and meter readings, how to prescribe relative precedence to each interval, and even how to trigger preventative maintenance ahead of schedule when needed. Attend this session to learn how to make our software do the majority of the heavy lifting for you!

Implementation Strategies for the Equipment Maintenance Process
This “best practices” session demonstrates how the answers to a fundamental set of questions centered on finding the right implementation strategy can lead to very different approaches in B2W Maintain. In this class we’ll walk through a variety of implementation paths, each focusing on how to get the most value out of the equipment maintenance process. Attend this session to see how key performance indicators are met when the right questions are asked and answered during your implementation phase.

Telematics and Meter Readings
This session will show you how integration with third party manufacturers can extend the power of the B2W Operational Suite. You’ll see what kind of information can be imported, and learn how to manually trigger the data retrieval process, as well as how to set it up to run on a schedule. You’ll see how to connect to manufacturer sites (such as CAT, Komatsu or John Deere), to an aggregator of your choice (such as Earthwave or Telogis), and even to CSV files. Finally, we’ll demonstrate how the information you retrieve can drive your preventative maintenance routines and feed equipment locations in the B2W Operational Suite for use in reporting or on the Map.

Continued...
Understanding Change Orders

In this session, we’ll talk about best practices for handling change orders. We’ll start by talking about estimate coding strategies, which will help ensure that your original “as-bid” job has the appropriate level of granularity for your field tracking needs. Then we will focus in on real-life change orders examples, such as quantity increases or decreases for existing accounts, new accounts that were not a part of the original estimate, and even accounts that were a part of the original bid but are no longer required. Attend this session to learn about best practices for each of these common change order scenarios!

Tuesday, 9:45 a.m. - 11:00 a.m.

The B2W Mobile App

In this session, we’ll take you through a series of best practices pertaining to the B2W Mobile App, as our attention turns to day-to-day operations, including field logs creation and repair requests. We’ll demonstrate the initial setup, which allows users to synchronize a database from their mobile devices; the setup of a mobile device; and will review the options you have in the event of a lost or stolen device. Then, with a focus on efficiency, we’ll take a deep dive into using a mobile device for data capture, from the perspective of both a foreman, as well as a mechanic.

Tuesday, 1:45 p.m. - 3:00 p.m.

Time and Materials

This session begins by showing you how to set up your Time and Material rate sheets in Resources. You’ll then learn how to set up a purely T&M job, and also how to set up a job that includes both contracted work and additional T&M to be performed at agreed upon hourly rates. You’ll see how to enter hours and quantities against a job with a T&M component, and how pre-established T&M rates create a streamlined billing process. We’ll touch on “not to exceed” values at the account level and how to compare this to the dollars you’ve already billed. The session will end with a review of the T&M sign-off process via the B2W Mobile App.

Tuesday, 11:15 a.m. - 12:30 p.m.

Writing Your Own Excel-Based Reports

In this session, we’ll demonstrate a variety of ways to retrieve information from the filtered views within the B2W Operational Suite’s SQL Server database, using nothing more than SQL Server Management Studio (SSMS) and Microsoft Excel. The session begins with a simple demonstration of information retrieval from a single table, and progresses to more advanced topics, such as combining information from multiple tables, and using Excel to create pivot tables with the retrieved data. Attend this session to learn how to leverage external tools that extend the power of the B2W Operational Suite!

Tuesday, 3:15 p.m. - 4:30 p.m.

WHAT’S NEW AND WHAT’S NEXT SESSION

Another huge benefit of attending the annual B2W Software User Conference is the ability to see the latest features in action, and a sneak peak of what’s to come! In this track, attendees will interact directly with the teams responsible for designing and implementing new features within each B2W Software element. See demonstrations that focus on the features we’ve been coding over the past year, and take part in discussions that center on where we’re headed in the months to come.

What's New in B2W Estimate

In this session you’ll see a demonstration of the latest B2W Estimate features, including permanent versus temporary materials, workers’ comp codes, market analysis, and the ability to automatically update the software on your client workstations after you apply an update to your B2W server. You'll also learn how to use the highly anticipated spell check feature, create stored views on your listing tabs, and import electronic signatures for use on your bid forms.

Monday, 9:45 a.m. - 11:00 a.m.

What's New in B2W Track

Here you’ll learn about our latest enhancements to B2W Track, with a special focus on our brand-new framework for handling Time & Material work, entering meter readings via field logs, linking equipment and employees on a field log, and many other features designed to bring new levels of efficiency to your field tracking process.

Monday, 11:15 a.m. - 12:30 p.m.
What's New in B2W Maintain
Here you’ll learn all about our latest enhancements to B2W Maintain, with highlights including the ability to pull telematics information from third parties, streamlining your workflow via nested coding, and new methods for quickly searching your work orders and repair requests. Along the way, we’ll also demonstrate the ability to manually trigger preventative maintenance routines, add new parts on the fly, alternative ways to quickly schedule work orders, and new visibility into your historical meter readings.

Monday, 1:45 p.m. - 3:00 p.m.

What's New in the B2W Mobile App
In this session, you’ll see a demonstration of the latest enhancements to the B2W Mobile App, from the perspective of both a foreman and mechanic. Here you will learn how to create repair requests via your iPad or Android devices, and watch a demonstration of how a mechanic records the work related to performing preventative maintenance and equipment repairs. We’ll also show you how to use a mobile device to track hours and quantities for time & material work, as well as how to approve or reject field logs via the B2W Mobile App.

Monday, 3:15 p.m. - 4:30 p.m.

The B2W Estimate Roadmap
Now that you’ve learned what we’ve been up to for the past year, we’ll take you on a tour of features that are on the roadmap for 2015, giving you a unique opportunity to provide feedback on your first impressions! This lecture allows you to hear directly from our B2W Estimate product management team, asking questions and providing feedback directly to those responsible for designing and implementing new features.

Tuesday, 11:15 a.m. - 12:30 p.m.

The B2W Operational Suite Roadmap
Now that you’ve learned what we’ve been up to for the past year, we’ll take you on a tour of features that are on the roadmap for 2015, giving you a unique opportunity to provide feedback on your first impressions! This lecture allows you to hear directly from our team of Operational Suite product managers, asking questions and providing feedback directly to the team responsible for designing and implementing new features.

Tuesday, 1:45 p.m. - 3:00 p.m.

B2W Inform, Information Management and Analysis Element – NEW
In the construction industry, critical information needed to manage your business is unstructured and scattered in multiple formats, making it difficult to ensure your company runs efficiently and in an organized manner. In this session, you’ll learn about a brand new B2W Software element designed to complement your existing suite of B2W elements with new levels of flexibility and reporting! Be among the first to see our exciting new information management and analysis tool in action; giving you the ability to create completely customizable, electronic forms that collect essential data in the office and the field, using any device. Don’t miss out on this opportunity to learn how enterprise level analytics, including completely customizable reports and dashboards, can keep your company focused on internal trends and business practices. With B2W Inform, companies can track, manage, and analyze the huge amount of data being collected in all departments of the business, whether it’s safety (incidents/near misses), inspections, fuel, and any other paper documents you might have! With the ability to analyze and understand this information, businesses can streamline their current processes in order to save money, increase profits, and run more efficiently.

Tuesday, 3:15 p.m. - 4:30 p.m.

This year, B2W is proud to unveil a conference app for your smartphones and tablets. Take notes, see your personalized schedule, connect with your peers and more with the UC2015 mobile app.
EXECUTIVE TECHNOLOGY SUMMIT SESSIONS

In this Monday-only track you’ll hear from a panel of experts – including a few guest speakers – as they share their experience and insight on the art of maximizing profitability within the ever changing technological landscape of the construction industry.

Technology Trends: to the Cloud and Beyond
Are you wondering if the Cloud is right for your company? How telematics and machine-to-machine communication could make you more competitive? The impact BIM is having on the industry? In this session we’ll explore the latest technology trends and what they mean for your business.
Monday, 9:45 a.m. - 11:00 a.m.

Placing Mobile Devices in Your Team’s Hands
Sorting through all of the mobile technology options that are available can be tough. This session will explore the many options available and how to choose the best mobile technology for your company. We’ll also explore implementation strategies that will guarantee the greatest success.
Monday, 1:45 p.m. - 3:00 p.m.

Harnessing the Power of Your Information
With the wealth of information available at your fingertips, it can be tough to sort through everything. Even more challenging is knowing how to use all of that information. Learn how to make your data work for you and take your company’s efficiency and profitability to the next level.
Monday, 11:15 a.m. - 12:30 p.m.

The Impact of Technology on Your Business: Client Success Stories
What kinds of changes can you expect to see after implementing new technologies in your company? In this session, a panel of construction industry executives just like you will discuss the impact that technology has had on their businesses.
Monday, 3:15 p.m. - 4:30 p.m.

SOLUTIONS CENTER

The B2W Solutions Center is the place to go for individual assistance with questions that are too intricate or specific to introduce during a presenter-led training session, or for attendees who’d simply like a closer look at one of our offerings. The solutions center is available at key times throughout the conference – including all times when traditional sessions are taking place – and is manned with knowledgeable support and development personnel to help you get the answers you need.
Monday & Tuesday, 9:45 a.m. - 5:30 p.m.