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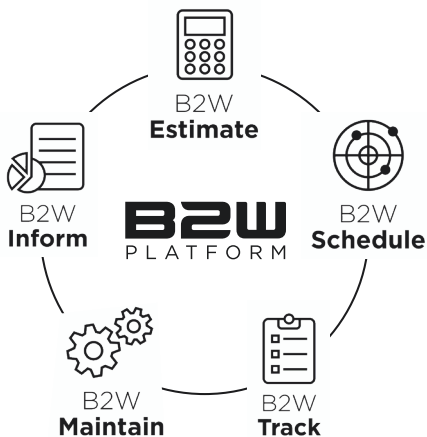


B2W SCHEDULE

SCHEDULING & DISPATCHING

23.1 Features Overview

B2W Software empowers and inspires heavy civil construction companies to win more work and complete it more profitably. The company's unified platform connects resources, workflows and data and includes applications to manage estimating, scheduling, field tracking, equipment maintenance, data capture and business intelligence.



B2W Schedule is a centralized, online solution for coordinated scheduling and dispatching of employees, crews, equipment, materials and trucking across locations and over time. Role-specific visibility and access allow employees throughout the enterprise to communicate and collaborate in real time to get the right resources to the right location at the right time.

Keep projects staffed and optimize resources with real-time visibility and enterprise-wide collaboration.

- Create needs which are immediately actionable, view changes as soon as they are saved, order equipment moves, materials or trucking and track the status of everything throughout execution.
- Configure customized views of the master schedule based on individual roles and requirements, increasing focus on resources and activities most critical to them.
- Mine data to review important metrics like equipment utilization or the allocation of employee, equipment or crews.
- Send emails or text messages through the system to alert employees, drivers and equipment moving crews on the latest information regarding assignments, deliveries, material mass hauls or equipment moves.



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Technology / Mobile Access

FEATURE	DESCRIPTION
Supported Browsers	Schedule can be launched in commonly used browsers such as Edge, Chrome and Firefox.
Supported Devices	Schedule can be launched through the B2W Mobile Application in either iOS or Android Devices. (Note: Contact B2W Support for details on version and hardware requirements for the Mobile App.)
Named User Licenses	Data security is essential to any company. Named user licenses ensure employees using B2W Schedule have access only to the data and views that are relevant to them.

Administration & Security

This section of B2W Schedule is the hub for managing users, user groups, data, access, and features.

FEATURE	DESCRIPTION
Full License	Full Schedule Licenses allow users to create, modify or delete items within Schedule for which they have permissions on.
Read Only License	Read Only Schedule Licenses allow users to view any schedule items for which they have permission to see.
Business Units	Create business units to organize your users.
Data Sources	B2W Operations database.
Users	Administrators can create, edit, and activate/deactivate new users.
Security Roles	Administrators can create, edit, and delete Security Roles and assign specific permissions to that role. Individual users can be assigned to multiple Security roles and will automatically inherit the permissions granted to that role.



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Setup

B2W Schedule utilizes the system's ability to setup/store different resources or views.

FEATURE	DESCRIPTION
Business Units	Create business units to section your organization into smaller segments.
Jobs	Set up jobs to store job sites and tracking accounts. (Required for production targets).
Job Sites	Set up job sites with properties such as supervisor, address and geo-fence information. (Required for creating assignments in schedule if places are not used).
Organization	Set up organization to help schedule subcontracted or rental resources.
Places	Set up places to capture locations which are not job sites which still require scheduling resources. (Required for creating assignments in schedule if job sites are not used).
Labor Types	Set up labor types to help classify your employees. (Required for capturing employee needs in Schedule.)
Employees	Set up employees with properties such as roles, labor types, certifications or contact information. (Required for sending notifications to drivers).
Equipment Categories	Categories can be used to group Equipment Types.
Equipment Types	Set up equipment types to help classify your equipment as well as add additional properties such as capacities. (Required for capturing equipment needs in Schedule.)
Equipment	Set up equipment with properties such as type, requires moves (required for system move orders), ownership type and equipment tags.
Work Types	Set up work types to help classify your crew templates (Required for capturing crew needs in Schedule).
Crew or Truck Templates	Set up named templates that are either tied to an organization or comprised of employee or equipment resources or needs. Use these groups of resources to assign to locations to do production work or orders to move equipment or material between locations.
Schedule Setup	Use schedule setup to configure an unlimited number of views to display resources over time. (By the hour, day or week.)



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Schedule Items

The following are items which are created and reflected in the different schedule views in line with the resources which they are associated with. Contractors can use some or all of the available resources when scheduling.

Employee Scheduling

FEATURE	DESCRIPTION
Employee Needs	Employee needs are assignments at a location which are associated with a labor type. These require additional action to associate them with an employee resource, which can be done through our orders and needs panel.
Employee Assignments	Employee assignments are assignments at a location which involve a named employee. These can be linked to other resources or needs.
Events	Events are records associated with an employee for a date or date range which might include vacations, sick days or other user defined items.
Conflicts	Schedule automatically identifies any overlap in assignments or conflicting events and shows the conflicts on the users view. The user can then use our conflict panel to systematically resolve conflicts by selecting one and choosing from a list of resources for a replacement.
Certifications	Certifications can be created for employees which can then be used to filter your schedule views when assigning resources.
Employee Notifications	Notify your employees about changes to their assignment after the schedule has been finalized directly from the UI. The system will keep track of any new, updated or deleted assignments for the day you wish to notify for.



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Equipment Scheduling

FEATURE	DESCRIPTION
Equipment Needs	Equipment needs are assignments at a location which are associated with an equipment type. These require additional action to associate them with an equipment resource, which can be done through our orders and needs panel.
Equipment Assignments	Equipment assignments are assignments at a location which involve a named equipment. These can be linked to other resources or needs.
Move Order	Move orders are moves associated with either an equipment resource or custom item. These require additional action to assign them with a transport crew. These can be manually created or, if the equipment is flagged as requiring a move, the system can automatically generate a move based on changing assignments.
Move Assignments	Move assignments are assignments between locations for an equipment resource or custom item that involve a transport crew template. These can contain resources or needs as well as added resources and needs outside the crew template.
Move Notifications	User triggered alerts can be queued and sent through the move planner interface using an employee or organization's contact cell number or email address. These notifications allow the user to accept, reject or complete assignments through the B2W Recipient Portal.
Events	Events are records associated with an equipment asset for a date or date range which might include equipment breakdowns or expected repairs, among other user defined items.
Conflicts	Schedule automatically identifies any overlap in assignments or conflicting events and shows the conflicts on the users view. The user can then use our conflict panel to systematically resolve conflicts by selecting one and choosing from a list of resources for a replacement.
Current Equipment Location	The system can calculate the location of a piece of equipment based on coordinates from moves, telematic readings or user defined locations. These coordinates are then compared against geo-fences associated with job sites and other places in the system.



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Production Crew Scheduling

FEATURE	DESCRIPTION
Crew Needs	Crew needs are assignments at a location which are associated with a work type. These require additional action to associate them with a production crew resource.
Move Order	Orders for materials, trucks or equipment can be associated with production crews working at different locations.
Production Crew Assignments	Crew assignments are assignments at a location which involve a production crew template. These can contain resources or needs as well as added resources and needs outside the crew template.
Production Targets	Targets are daily goals associated with a production crew which provide visibility into what is expected to be executed day-to-day, which might be different than the average quantities shown on the bid.
Conflicts	Schedule automatically identifies any overlap in assignments or conflicting events and shows the conflicts on the users view. The user can then use our conflict panel to systematically resolve conflicts by selecting one and choosing from a list of resources for a replacement.



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Materials and Truck Scheduling

FEATURE	DESCRIPTION
Delivery Material Orders	Delivery material orders are orders for a quantity of a material which can be brought to or removed from a location within a window of time. Depending on the material type, these orders can often be scheduled with equipment moves which are taking place at the same or nearby locations.
Delivery Assignments	Delivery assignments are assignments between locations for a material resource that involve a transport crew or truck template.
Delivery Notifications	User triggered alerts can be queued and sent through the move planner interface using an employee or organization's contact cell number or email address. These notifications allow the user to accept, reject or complete assignments through the B2W Recipient Portal.
Truck Only Order	A truck only order allows for a number of trucks to be assigned to a location for a given start time and duration.
Mass Haul Material Orders	Mass haul material orders are orders for a quantity of material to be brought to or removed from a location on a given date at a specified rate. These orders can have trucks assigned to them or they can be configured to allow for customers to pick up the material directly at the source.
Mass Haul Assignments	Mass haul assignments are assignments for trucks to arrive at a location for a set time and work for a given duration.
Mass Haul Notifications	User triggered alerts can be queued and sent through the mass haul planner interface using an employee or organization's contact cell number or email address.



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Schedule Views

Schedule views can be configured so that users are viewing only information that they wish to see. Any changes from these views impact a single database of resources and assignments and can be immediately viewed in other schedule views.

FEATURE	DESCRIPTION
Location Overview	Location Overview allows user to view a summary of multiple locations. A user can also quickly drill into a location to view more information about schedule items occurring.
Location Overview - Map	Location Overview also contains a map which has the same functionality for reviewing locations and locating the current location of equipment resources. A user can make adjustment either through menus or drag and drop of resources between locations. The user also has the ability to use layers such as traffic, satellite or street view.
Location Overview - Compare	Location Overview also contains a view which allows user to compare multiple locations side-by-side and make adjustment either through menus or drag and drop of resources between locations.
Move Planner	The user can utilize the B2W Move Planner within schedule for assigning moves to transport drivers (either internal or subcontracted) and organizing them through stop locations. These move assignments can be sent to the driver through email or text through our notification workflow.
Mass Haul Planner	Mass Haul Planner allows for the user to assign multiple trucks to a single order in a simple bulk update and assign view. A user can keep track of trucks which have confirmed their assignment as well as trigger notifications to be sent to either the truck driver or, for external trucks, the truck dispatcher.
Schedule View - Resource Listing	This is a type of schedule which is a flat list of employees and/or equipment resources or needs that the user has permission to view. This view can be filter or group based on employee and equipment properties. A user can also restrict permissions to these views and create as many variations of this type of schedule as desired.
Schedule View - Crew Listing	This is a type of schedule which is a default grouped list of crews that contain and/or equipment that or crew needs the user has permission to view. This view can be filter or group based on crew properties. A user can also restrict permissions to these views and create as many variations of this type of schedule as desired.
Schedule View - Location Listing	This is a type of schedule which is a default grouped list of locations (job sites or places) that the user has permission to view. These locations can contain crews, crew needs, employees and/or equipment resources or needs. This view can be filter or group based on crew properties. A user can also restrict permissions to these views and create as many variations of this type of schedule as desired.



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FEATURE	DESCRIPTION
Schedule View - Customer Listing	This is a type of schedule which is a flat list of customer organizations the user has permission to view. These customers may have orders for materials, trucking or both. This view can be filter or group based on an organization's properties. A user can also restrict permissions to these views and create as many variations of this type of schedule as desired.
Schedule View - Map	The map can also be launched from any of the above schedule views which provides geographical context for any of the resources loaded onto a given schedule view. A user can make adjustment either through menus or drag and drop of resources between locations. The user also has the ability to use layers such as traffic, satellite or street view.
View Options / Filters	The user can choose to apply any additional filtering or view options to the above listed views. The filters are stored by users and persisted through sessions.
Order Manager	Users can quickly create, edit or delete material orders for a given location by utilizing the Order Manager.
Notification Log	B2W provides a notification log which lists notifications which have been sent by B2W Schedule users and the details around the content of those notifications. (Note: This is only available for 'Move & Delivery Assignments' at this time).
Recipient Portal	B2W provides recipients of text and email notifications to open a recipient portal for them to update the status of their assignments or leave responses for their dispatcher to review. (Note: This is only available for 'Move & Delivery Assignments' at this time).

B2W Services

FEATURE	DESCRIPTION
System Equipment Moves Orders	Equipment with the mobility type of "Requires Move" will automatically have a move generated when a change of location has been detected.
Conflict Identification	When resources are assigned and have overlapping times or have been made unavailable due to sickness, vacation or equipment breakdowns, the system will identify the conflicts and provide a path for resolution.
Text and Email Notifications	B2W looks for any new, updated or removed assignments and compiles a list of employees or contacts to notify of these changes. These can be sent by either SMS Text or Email.
Notification Log Service	B2W provides a notification log service which documents what notifications were sent by Schedule users. This information includes context as well as detailed content of what was included in the notification.



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B2W Track Integration

Contractors that already own or are interested in B2W Track also get the benefit of the following functionality:

FEATURE	DESCRIPTION
View Field Log Hours in Schedule	B2W Track users with access to Schedule can review a custom schedule which will total field log report hours for the time frame in their view.
Submit Needs from Track	Users can quickly easily submit a need (without a Schedule licenses) through B2W Track.
Create Field Log from Schedule	A company using both Schedule and Track can populate a field log using Schedule assignment information, such as pulling in jobs, tracking accounts, targets, employees, equipment and materials.

B2W Maintain Integration

Contractors that already own or are interested in B2W Maintain also get the benefit of the following functionality:

FEATURE	DESCRIPTION
Visibility into Work Orders from Schedule	B2W Schedule users see events in which work orders have been associated with.
Last/Next Assignment Location in Maintain	B2W Maintain users can see the last and next assigned locations utilizing B2W Schedule information.



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Reports

With the availability of reports, B2W Schedule promotes smart data analysis and communication across the business. Along with these Schedule reports are many other job or resource centered reports available to the user. Custom reports can also be created using any of the data fields captured within other B2W operational elements. With any report, a user can configure subscriptions to send them automatically to a group of users at timed intervals.

FEATURE	DESCRIPTION
Schedule Call List Report	Report that lists employees who will be starting an Assignment on the selected date.
Schedule Daily Report	Report showing the needs and assignments for each location for a specified date.
Schedule Equipment Scheduled vs. Utilized	Report showing the daily utilization reported on field logs for scheduled equipment for either a two-week or twelve-week period.
Schedule Daily Supplier Report	Report that list material orders for a specified date grouped by source location. Totals by material can be displayed by day, night or across both.
Schedule Resource Backlog Report	Report showing assignments by resource for a specified period along with a count of assigned days within that period (30 days, 180 days, 365 days or other).
Schedule Notification Report	Report showing who sent a notification from B2W Schedule and to whom it was for.
Report Output	PDF, Excel, HTML, CSV.