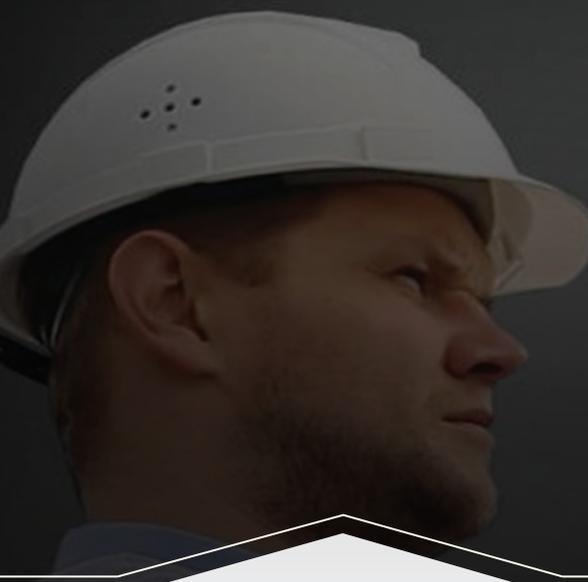# B2W

SOFTWARE

B2W INFORM

DATA CAPTURE AND ANALYSIS
Features Overview

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

B2W Inform empowers companies to capture data more effectively and turn it into actionable intelligence. Fast, easy creation and management of highly configurable form templates enable companies to expand and structure data collection, replace inefficient paper-based processes and capture richer content in real time. An advanced business intelligence and reporting engine allows companies to generate and deliver reports, dashboards and alerts needed to improve operational performance, safety, quality and financial outcomes.

COLLECT MORE AND BETTER INFORMATION AND TURN IT INTO ACTIONABLE INTELLIGENCE

- Timely analysis of data from electronic forms
- Custom reporting and dashboards
- Event-driven alerts
- Fast, easy creation of configurable form templates
- Dynamic, connected forms to capture rich data

B2W ESTIMATE
B2W INFORM
ONE
B2W SCHEDULE
B2W MAINTAIN
B2W TRACK

B2W Inform Environment

FEATURE	DESCRIPTION
SaaS Model	A software-as-a-service (SaaS) model allows for subscription-based purchasing.
Multi-Tenanted Architecture	A single instance of the B2W Inform application serves multiple customer companies. Each customer company is a tenant and can only access data within their own tenant.
Log-in Portal	Users log in to access B2W Inform from any modern web browser on any supported device through a user name (email) and password.
Named User Licenses	Data security is essential to any company. Named user licenses ensure employees using B2W Inform have access only to the data and forms that are relevant to them.
Authentication/ Authorization & User Permissions	Various access levels and permissions for data and functions within the B2W Inform application can be assigned to specific users to ensure security and privacy.
Adaptive User Interface	The user interface of the B2W Inform application adapts automatically to the size of the computer, tablet or smart phone being used to access and use it.
Any Device	B2W Inform can be accessed by any supported web-enabled computer, tablet or smart phone via any modern browser.

Administration & Security

This section of B2W Inform is the hub for managing users, user groups, data, access, and feature management.

FEATURE	DESCRIPTION
Application Settings	Turn specific settings on or off for your B2W Inform application.
Business Units	Create business units to organize your users.
Data Sources	B2W Inform can be set up to access resources in B2W Operations, enabling data binding of form fields within B2W Inform templates and forms.
Data Storage	Track your data usage within B2W Inform.
Template Categories	This feature allows administrators to organize templates and forms by hierarchical categories that they establish.
Template & Form Groups	In addition to organizing templates and forms with the Template Categories feature, they can also be tagged with a specific group and/or sub-group. These groups can be data-bound or not. For example, tagging a form with a specific job allows a company to filter or search for all forms associated with that job.
Users	Administrators can create, edit, and activate/deactivate new users.
User Groups	Administrators can create, edit, and delete User Groups and assign specific permissions to user groups. Individual users can be assigned to User Groups and will automatically inherit the permissions granted to that User Group.

Templates

The Templates area of B2W Inform guides users in easily creating form templates to capture specific data required. B2W Inform allows for complete customization of any type of form template and includes components that enhance data capture while minimizing errors, ambiguity and inconsistencies.

FEATURE	DESCRIPTION
Create Customizable Templates	An unlimited number of templates can be created to base forms off of. The templates are 100-percent customizable and can be used to create entirely new forms or to replicate paper forms currently in use.
Drag and Drop Template Builder	No training or specialized expertise are needed for the easy-to-use template builder. Template components can simply be dragged and dropped to build forms.
Positioning Lines	Guiding lines help to position components in exact positions.
Assign Categories	Categories can be assigned to a template and will be inherited by all forms based off of that template.
Require Approval	When building a template, users can decide whether or not any forms based off of this template will require a review workflow for approving/rejecting. Forms that require approval will be submitted to one or more reviewers (includes automatic email notifications as part of this process). Forms that do not require approval will be completed.
Define Approvers for a Template	If a template requires approval, the Template Creator can decide to define a list of approvers that form fillers can select from, or, can even define a defined approval sequence that the form filler cannot modify.
Copy from Existing Templates	When building a new template, users have the option of copying from a template that has already been built. This allows simple modifications instead of having to create a new template from scratch.
Assign Groups and/or Sub-Groups	Assigning a group and/or sub-group allows templates to be tagged for enhanced organization. Groups and/or sub-groups are then inherited by the form.
Page Setup	This feature determines the size and orientation of the template.
Multi-Page Templates	An unlimited number of pages can be added.
Template Access	Template Creators can grant access to specific forms from the template properties area. For example, the "Foremen" user group could be given access to fill out an Accident Form, or even an individual user.
Comprehensive List of Controls	A variety of template components provides a high level of flexibility and fields for building a template. See below for a comprehensive list.

B2W SOFTWARE

FEATURE	DESCRIPTION
Required Fields	Making certain components on a template required prevents the form from being completed/submitted unless those components are filled in. This prevents incomplete forms, ambiguity and rework.
Validated Fields	Some template components require a certain type of input in order to be validated. For example, the e-mail component will only accept what looks like a valid email address. The form cannot be completed/submitted with invalid data.
Data-Bound Fields	With the ability to bind data (e.g. employee lists, equipment lists) from other B2W Operations elements, users filling out forms no longer have to search for the correct information. Live connections ensure that the data-bound information is always accurate.
Data-Bound Filtering and Auto-Populating	Using data-bound dropdown fields and the auto-populate component, users can set up links between these components so that they can filter data in one dropdown by another. They can also auto-populate other relevant data into a component based on the selection in a dropdown field.
Copy, Paste, & Highlight Components	The ability to copy and paste components and to highlight multiple components for universal formatting changes can save the template builder considerable time.
Undo/Redo	Undo or redo actions while building your template.
Move Components	Move one to many components all at once as well as with your keyboard arrow keys.
Custom Formatting	The template toolbar is used to change text size, move label placements and make other formatting changes to components on a template.
Save Template as Draft	Templates that are under construction can be saved as a draft.
Publish Template	Publishing templates makes them available to be filled out as forms to those who are allowed to fill it out.
Delete Template	Templates that are no longer in use can be deleted.
Search Templates	This type-ahead field allows users to search for specific templates.
Filter Templates	Templates can be filtered by Template Owner, Category, Group/Sub-Group, and Date.
Sort Templates	A list of templates can be sorted by Date, Template Name, Category, and Owner.
Preview Template (PDF)	PDF files can be generated based off of the template to see what it will look like as a form.
Template Versioning	With template versioning, old copies are tied to previously filled-out forms.

Template Component Palette

The following components, or form fields, can be included in a template by simply dragging and dropping from the Inform palette.

FEATURE	DESCRIPTION
Static Text	Descriptive text.
Text Box	Single- or multi-line.
Date/Time	Select or input a date and/or time into this field.
Email	Validated for correct formatting.
Phone	Validated for correct formatting.
URL	Validated for correct formatting.
Section Container	Component can contain other components, making it easy to create distinct sections within a form.
Dropdown	Displays a selection of data; can be data-bound to B2W Operational Database or a custom list of options. Can be a single/multi choice selection as well as having the option to type in a custom choice.
Auto Populate	Read-only field based on a selection made from a data-bound dropdown list OR read-only meta data about the form being filled out.
Checklist	Check off multiple options displayed on the form; options are custom.
Radio Buttons	Select one of multiple options; options are custom.
Check Box	A single checkbox with or without a label.
Media Upload	Allows the form filler to attach and/or capture photos and videos.
File Upload	Allows the form filler to attach any relevant files.

FEATURE | **DESCRIPTION**

E-Signature
Capture the printed name, signature, timestamp, and GPS coordinates of when and where the user signed the form; validation determines whether or not the signature is current. For the printed name, select from a list of Inform users, data-bound employee names, or type in a custom name.

Numeric
Validated – field can only contain numbers.

Currency
Validated – field can only contain numbers.

Embedded Media
Embed media like logos or pictures into template.

Embedded File
Embed files like PDFs into template so that the form filler can utilize them while filling out forms.

Hyperlink
Embed a specific hyperlink into template so that the form filler has access to this link when filling out the form.

Time and Geolocation Stamps
Enable forms to automatically generate geolocation stamps and timestamps when saved, completed, or submitted.

Computed
Execute formulas using multiple data fields on the template.

Table
Use multiple components within one table for formatting purposes.

Forms

The Forms section of B2W Inform allows companies to standardize and structure data collection enterprise wide, enhancing processes and gaining valuable efficiencies as well as real-time access to data.

FEATURE	DESCRIPTION
Status Tabs	The status of each form is accessible via this tab on the B2W Inform home page: Drafts – any forms still being worked on Complete – completed forms that do not require approval Pending – forms that have been submitted for review Rejected – forms that have been reviewed and rejected Approved – forms that have been reviewed and approved
Sort Forms	Forms can be sorted by Date, Form, Template, Category or Owner.
Filter Forms	Forms can be filtered by Form Owner, Template, Category, Group/Sub-Group and Date.
Filter Pending Forms	If a user has both the Form Filler and Form Approver permissions, filter the forms to see only your pending forms, or forms pending your approval.
Search Forms	This type-ahead field allows users to search for specific forms.
Fill Out a Form	Forms to be filled out can be selected from the Forms Library.
Search your Form Library	This type-ahead field allows users to search for specific forms.
Filter your Form Library	The dropdown filter allows users to look at forms based on category.
Select and Copy a Previously Filled Out Form	Forms that were previously filled out can be selected and modified to save time. This will display the last instance of each form type you filled out.
Form Name	Inform will generate a name for a form that can then be edited.
Assign Groups/ Sub-Groups	Assigning a group and/or sub-group to a form allows users to tag a form with another means of organization. Groups and/or sub-groups assigned to the template are inherited by the form.
Approve/Reject Workflow	A person filling out a form can submit that form to one or more approvers for review. The form reviewers can also add more people to the list to review the form. The approval sequence can be saved and reused each time the same form is used.

B2W SOFTWARE

FEATURE	DESCRIPTION
Approve/Reject Workflow Notifications	When a form is submitted to a reviewer, that person will get an e-mail telling them there is a form to review. Notifications will also be sent out to the appropriate parties if a form is rejected or approved with any rejection/approval comments.
Form History	For forms requiring approval, B2W Inform captures all approve/reject workflow history for each form.
PDF Appendix	For any forms that have multiple media and file attachments as well as form history, an appendix will automatically be placed at the end of the form PDF and display all of these additional items.
Save as Draft	Unfinished forms can be saved as a draft.
Complete Form	Forms that do not require review/approval must be completed.
Submit Form	Forms that require review/approval must be submitted.
Recall Form	Forms that have been submitted can be recalled back into Draft status.
Delete Form	Forms that are no longer needed can be deleted.
Preview Form	Forms can be previewed as a PDF document.
Download Form	Previewed forms can be downloaded onto the device.
E-Mail Form	E-mail Form PDFs directly form the form page to Inform users and/or external users.

Reports & Dashboards

With the availability of reports, B2W Inform promotes smart data analysis, allowing companies to leverage the data they've captured in B2W Inform and their B2W Operations resources data as well as meta data about the application and make smart business decisions.

FEATURE	DESCRIPTION
Express Reports	Build and format basic tabular reports.
Standard Reports	Excel-like form builder with added functionality such as data visualizations, charts, formulas, and conditional formatting.
Crosstab Reports	This simplifies creating complex tables with summary results grouped in both rows and columns within the report.
Linked Reports and Drilldowns	Users can link together charts and reports in order to drill through data.
Search Forms	This type-ahead field allows users to search for specific forms.
Linked Reports and Drilldowns	Users can link together charts and reports in order to drill through data.
Report Output	PDF, RTF, Excel, HTML, CSV
Schedule Reports	Reports can be scheduled for automatic emailing or archiving.
Document Templates	Superimpose data collected in Inform onto a PDF, Excel, or RTF template document.
Reportable Data	Report on Form Data, System Meta Data, and B2W Operations data (granted the connection has been setup between B2W Ops and B2W Inform).

Communication

Read capabilities keep employees informed with real-time information from across the B2W platform and allow that enterprise-wide data to populate B2W Inform templates and forms.

FEATURE	DESCRIPTION
Read Capability to B2W Operational Database	A live connection to other B2W Operational elements allows data from these other elements to be accessible in B2W Inform.

Alerts & Notifications

The Alerts feature allows designated recipients to be alerted automatically by e-mail, text message or within the application when certain events or incidents in the B2W Inform application occur.

FEATURE	DESCRIPTION
Alerts and Notifications	Expression-based alerts can be created to notify recipients when something in the application happens. For example, a safety manager can be alerted any time that an accident form is completed in the field.
Notification Types	In-application, Email, Texts.
Copy Alerts	Copy existing alerts to save time creating similar alerts.