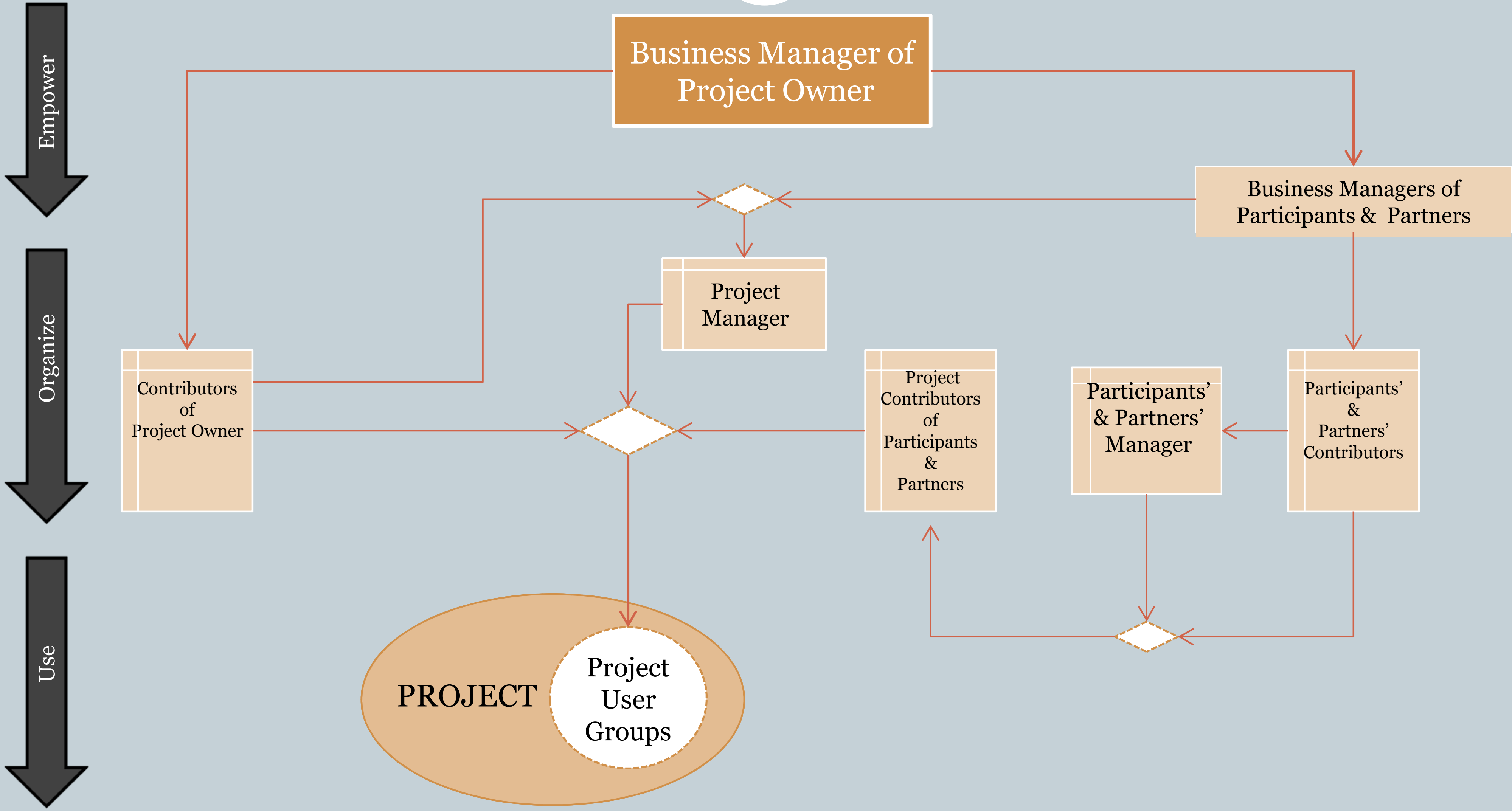
B-ECP

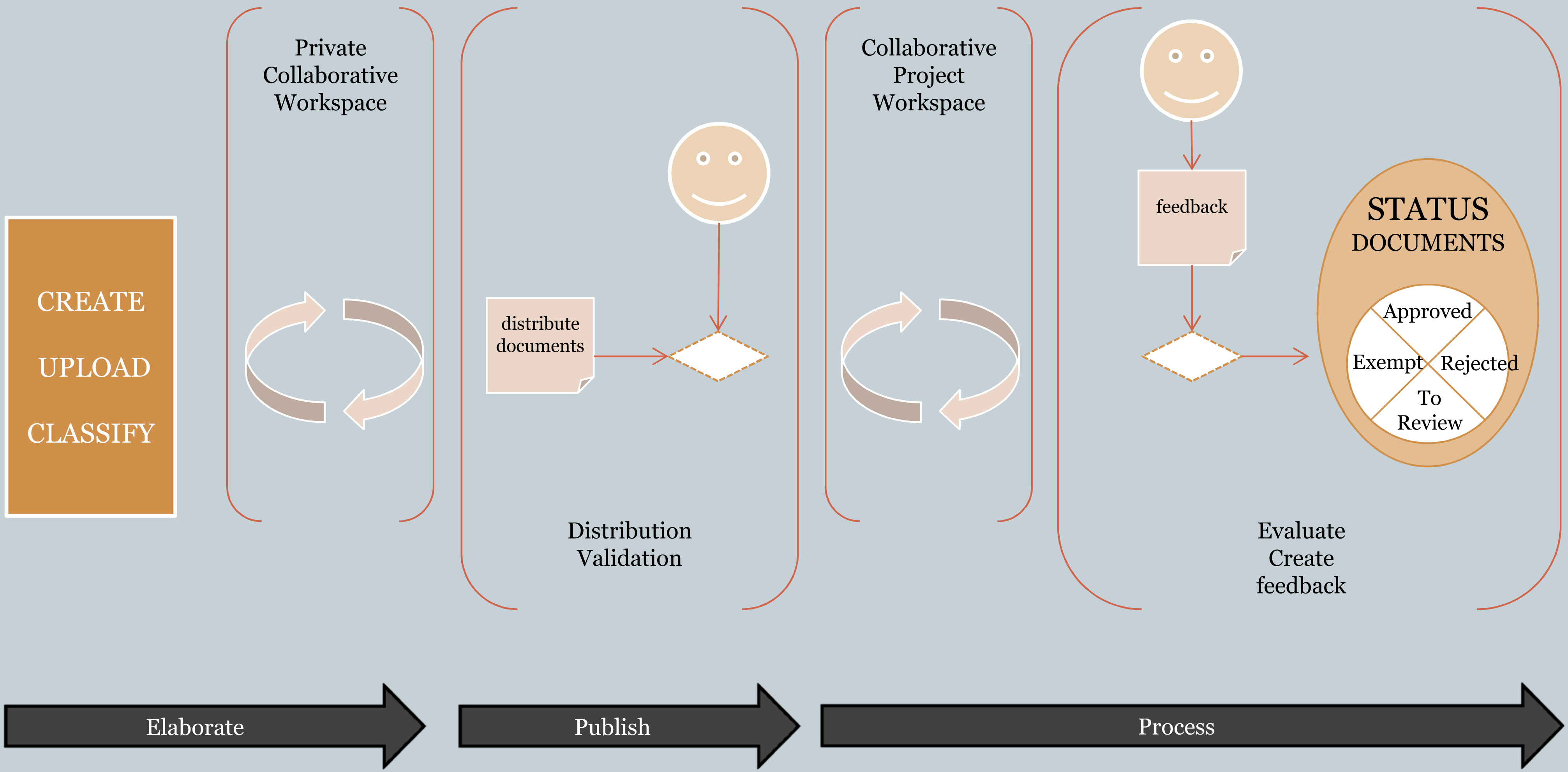
INTUITIVE AND CUSTOMIZABLE DOCUMENT MANAGEMENT

2-ORGANIZATION OF CONTRIBUTORS
3-DOCUMENT WORKFLOW
4-REGISTRATION
5-MANAGING YOUR COMPANY'S ACCOUNT
6-MANAGING YOUR COMPANY'S USERS
7-CREATING A PROJECT / PROJECT DETAILS
8-SELECTING THE USERS INVOLVED IN THE PROJECT & EMAIL PREFERENCES
9-DOCUMENTS CODIFICATION
10-DOCUMENTS CODIFICATION
11-DOCUMENTS CODIFICATION
12-CREATING ROLES
13-INVITING PARTICIPANTS TO A MULTI-COMPANY PROJECT
14-CREATING USER GROUPS
15-SETTING DOCUMENT ACCESS RULES
16-SETTING DOCUMENT APPROVAL RULES
17-MANAGING YOUR DOCUMENTS
18-MANAGING YOUR DOCUMENTS
19-MANAGING YOUR DOCUMENTS
20-DISTRIBUTING THE DOCUMENTS' FILES
21-DISTRIBUTING THE DOCUMENTS' FILES
22-EVALUATING THE DOCUMENTS
23-SENDING AND RETRIEVING THE EVALUATIONS
24-FOLLOWING THE EVOLUTION OF A DOCUMENT
25-INFORMATION AND COMMUNICATION EXTRAS

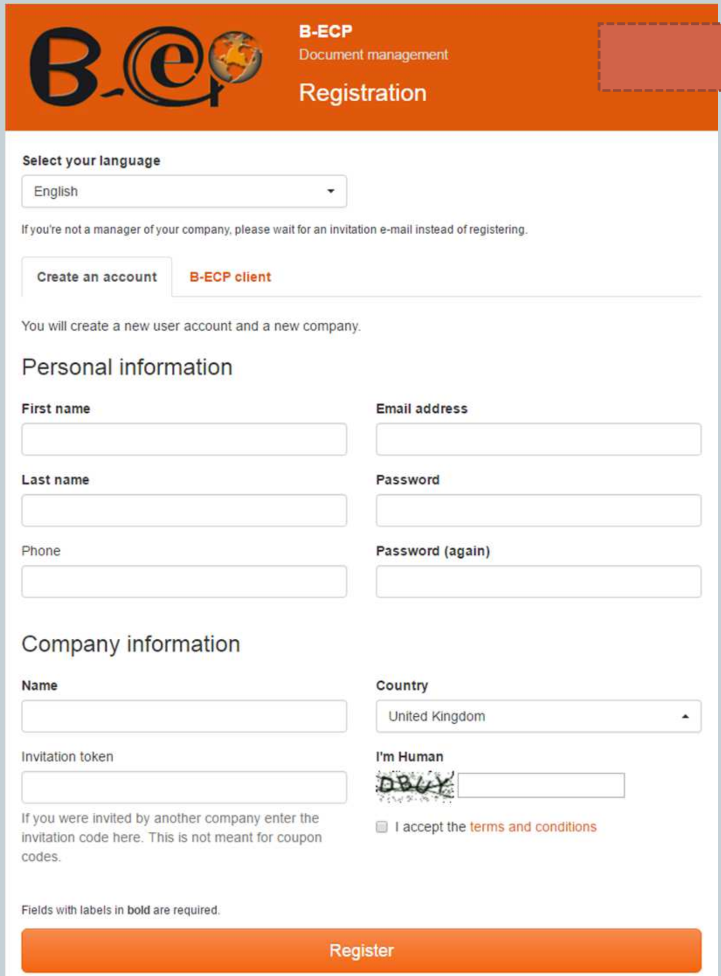
Organization of contributors



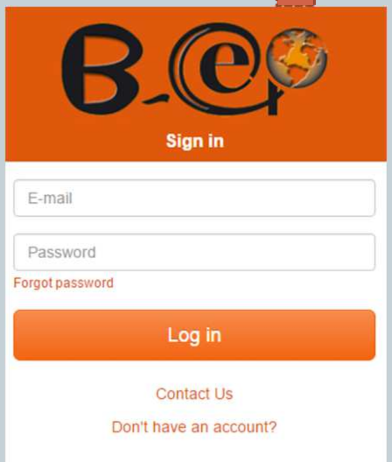
Document Workflow

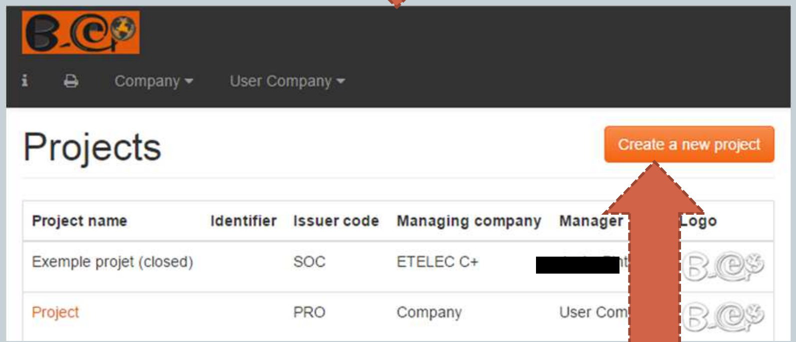


Registration



Fill in all mandatory fields at
https://app.b-ecp.com

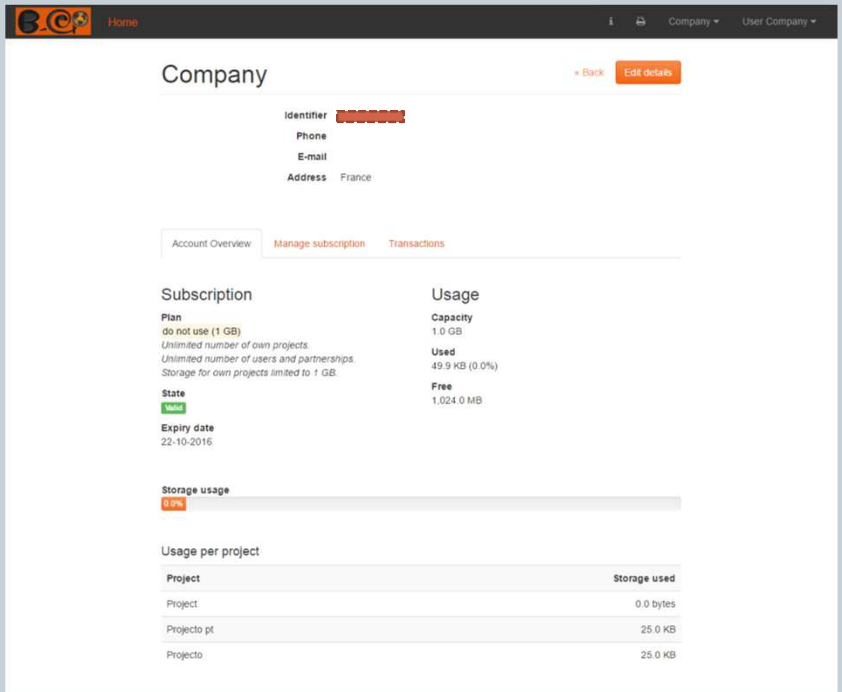


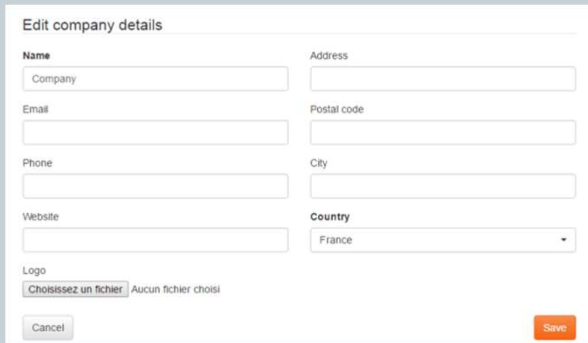


New project

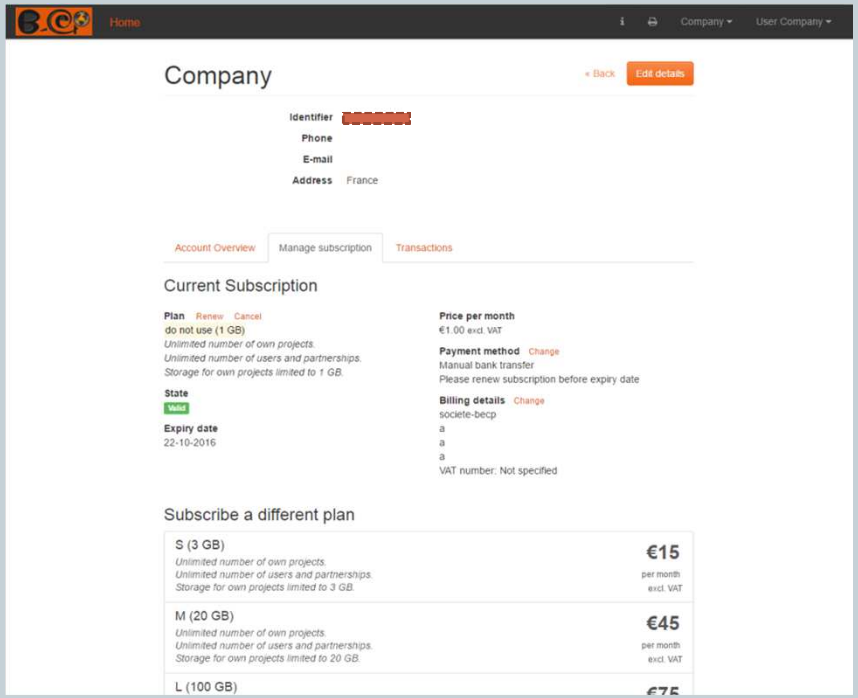
Managing your company's account

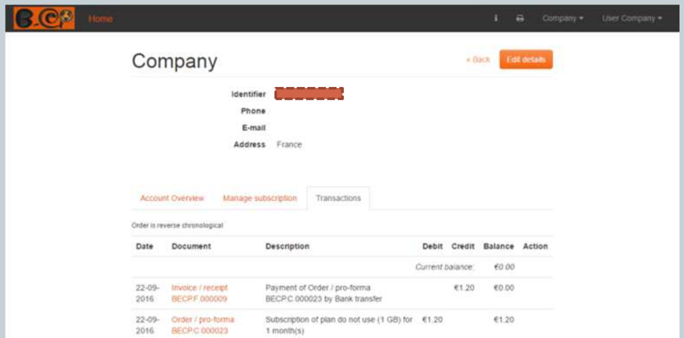
Viewing the status of the subscription and changing your company's identification details.





Changing your subscription; retrieving your orders and invoices.

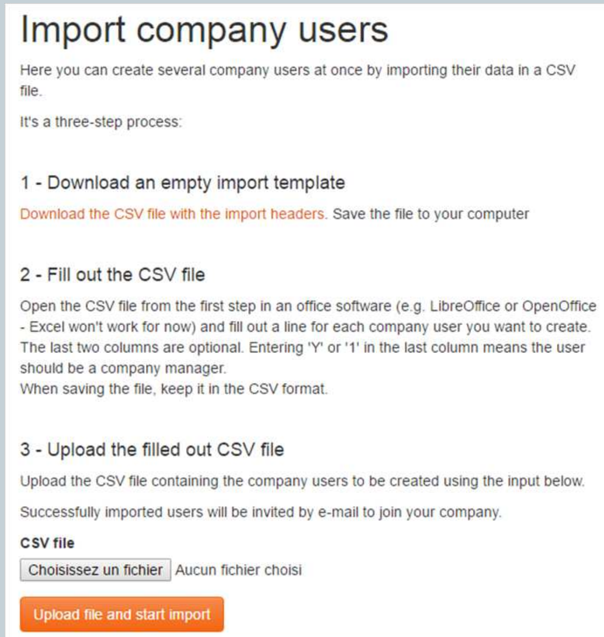




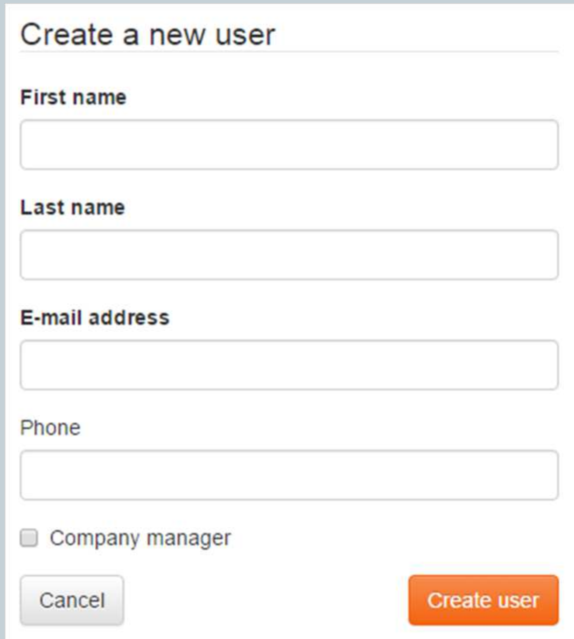
Managing your company's users

There are several ways of creating your users.

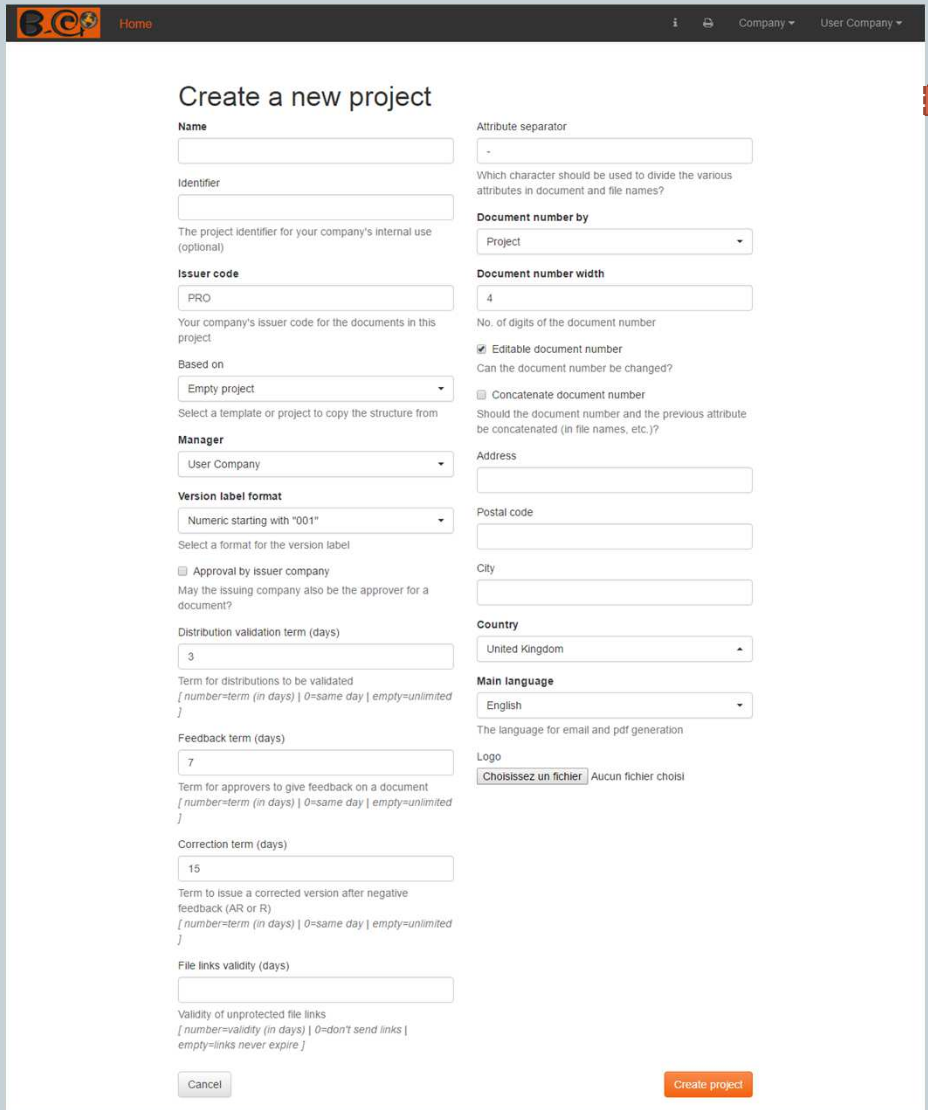
- Quickly import all of them



- Create each one individually

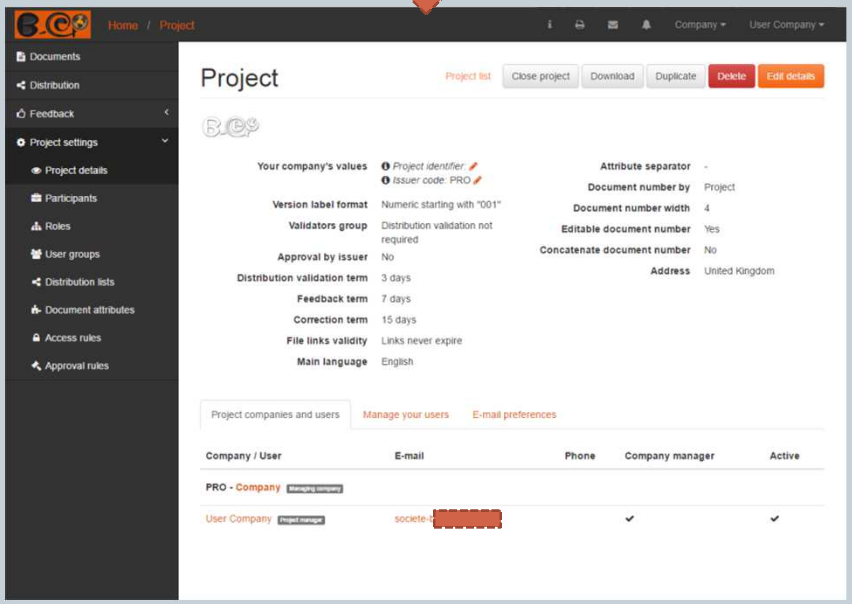


Creating a project / Project details

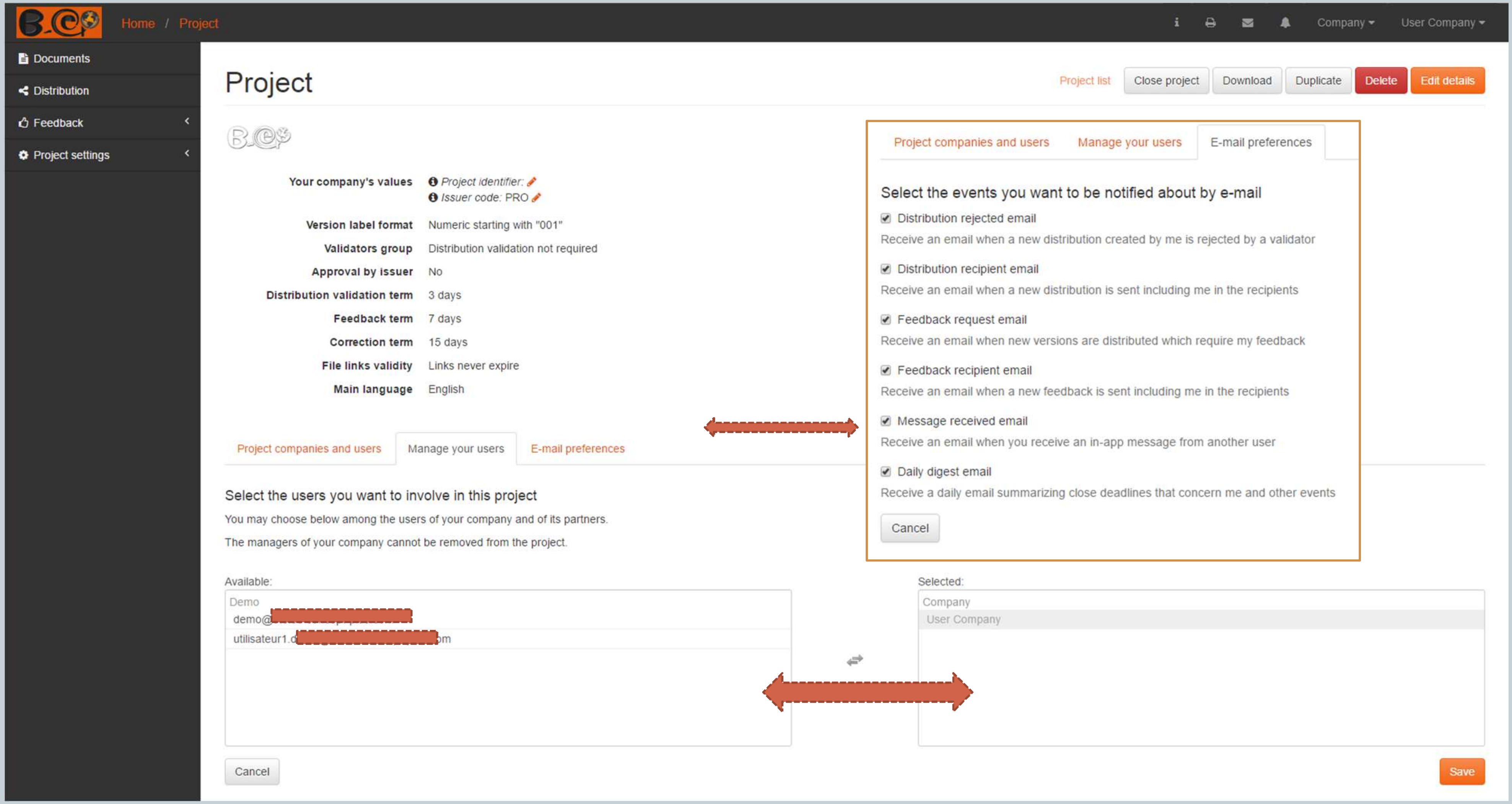


- Fill in the fields taking into account the project's customization requirements.
- You can start with a model with a preexisting structure and change it afterwards.

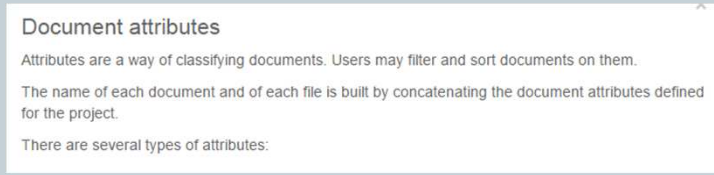
- On the project detail there's a summary of the parameters, as well as different actions, depending on your permissions. More on this in the context of roles, groups and corresponding rules creation.



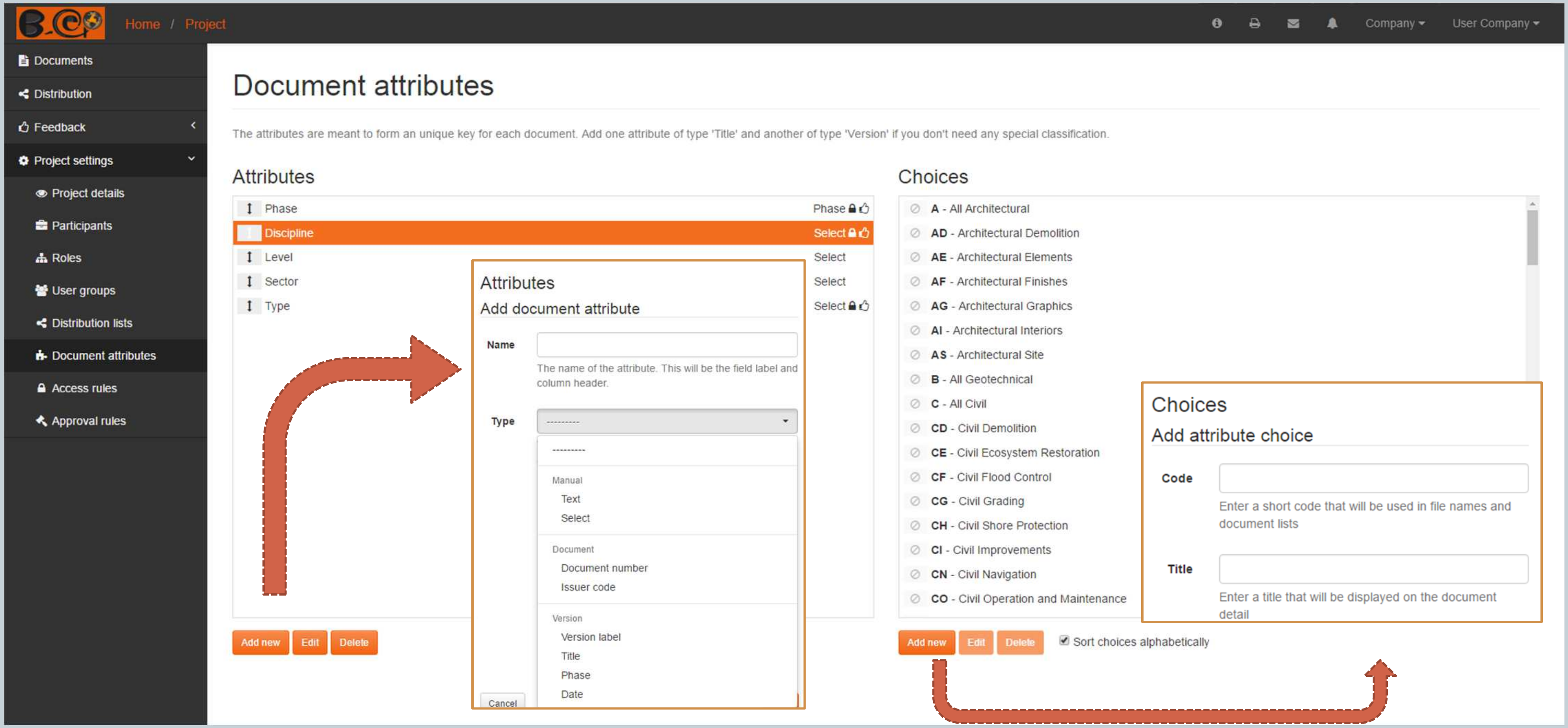
Selecting the users involved in the project & email preferences



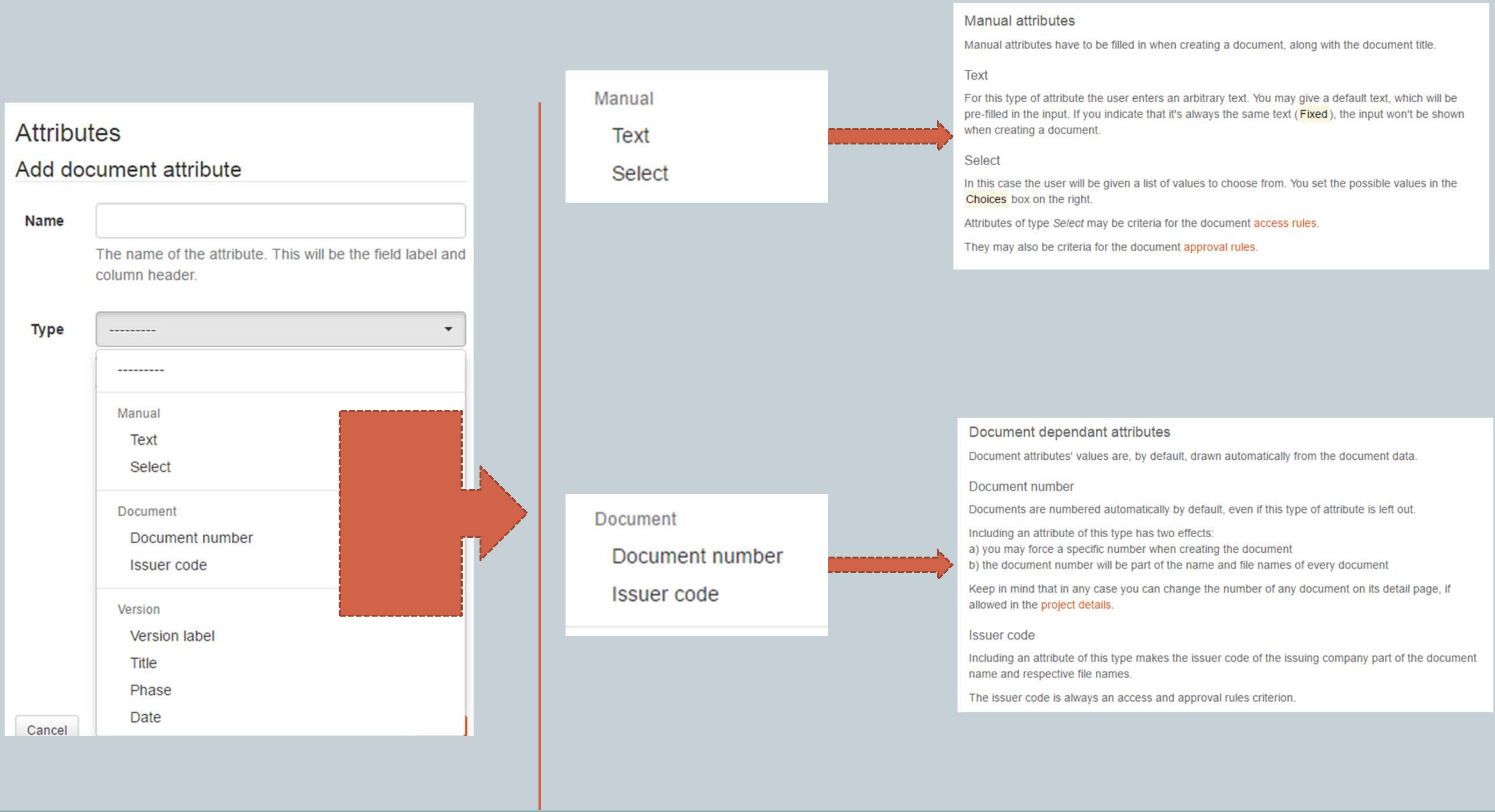
Documents codification



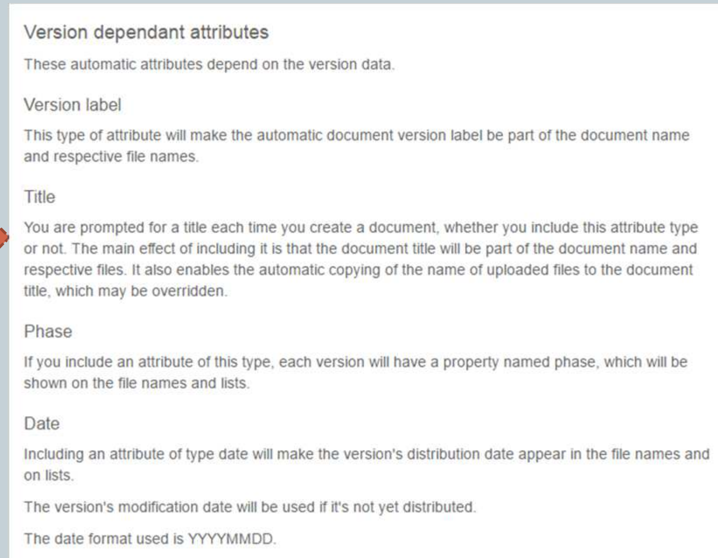
Create the document's organization structure according to your needs.



Documents codification



Documents codification


Version dependant attributes

These automatic attributes depend on the version data.

Version label

This type of attribute will make the automatic document version label be part of the document name and respective file names.

Title

You are prompted for a title each time you create a document, whether you include this attribute type or not. The main effect of including it is that the document title will be part of the document name and respective files. It also enables the automatic copying of the name of uploaded files to the document title, which may be overridden.

Phase

If you include an attribute of this type, each version will have a property named phase, which will be shown on the file names and lists.

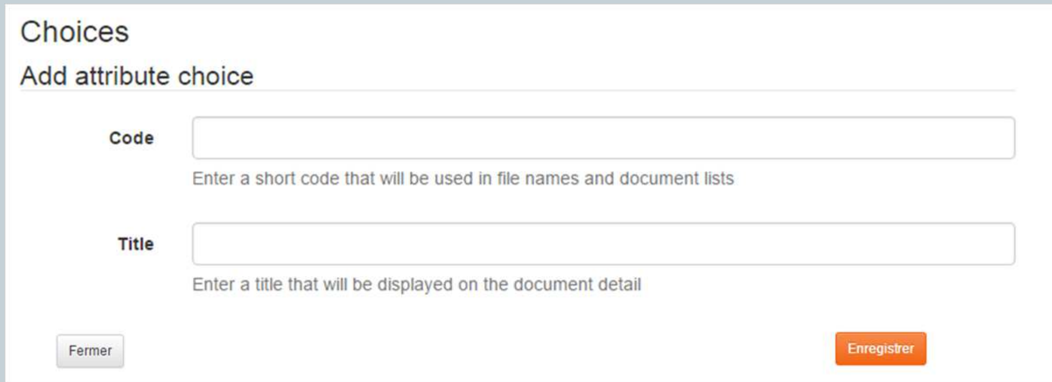
Date

Including an attribute of type date will make the version's distribution date appear in the file names and on lists.

The version's modification date will be used if it's not yet distributed.

The date format used is YYYYMMDD.

Choices allow for the creation of sub-categories in the codification elements.
(Element document «Type» / sub-category «Note»)


Choices

Add attribute choice

Code

Enter a short code that will be used in file names and document lists

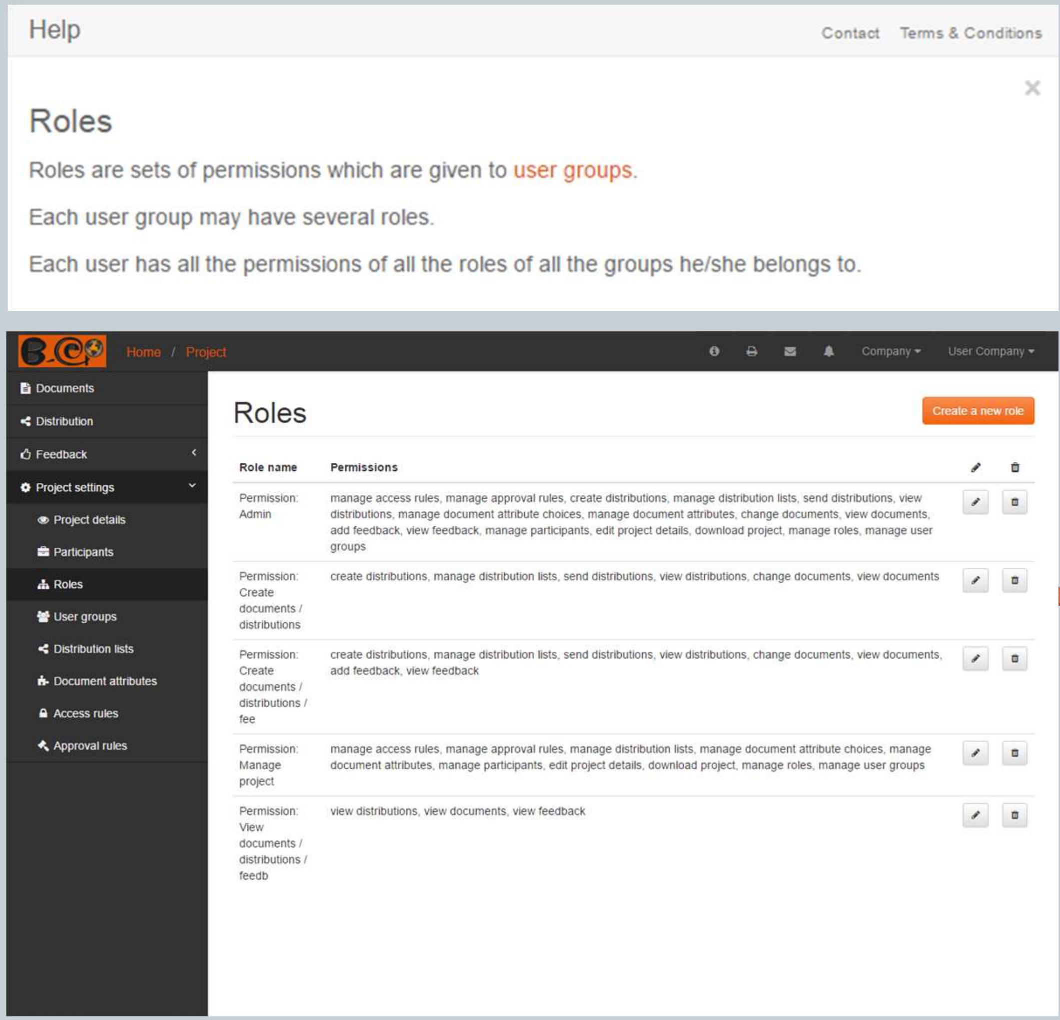
Title

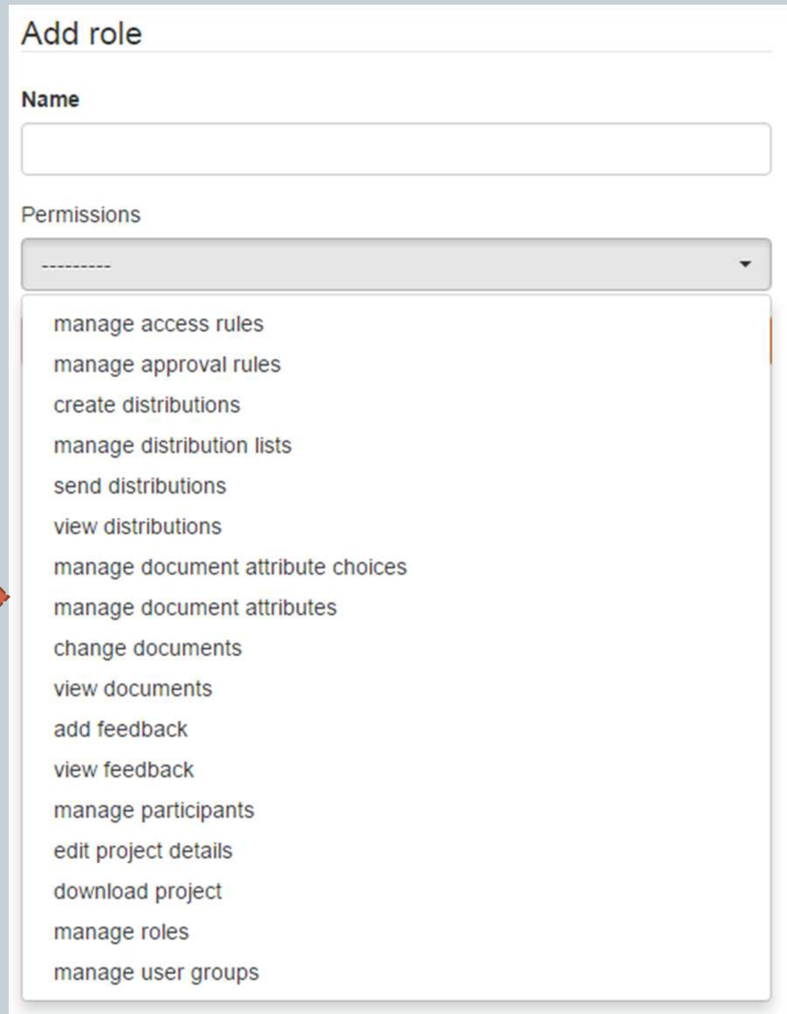
Enter a title that will be displayed on the document detail

Fermer

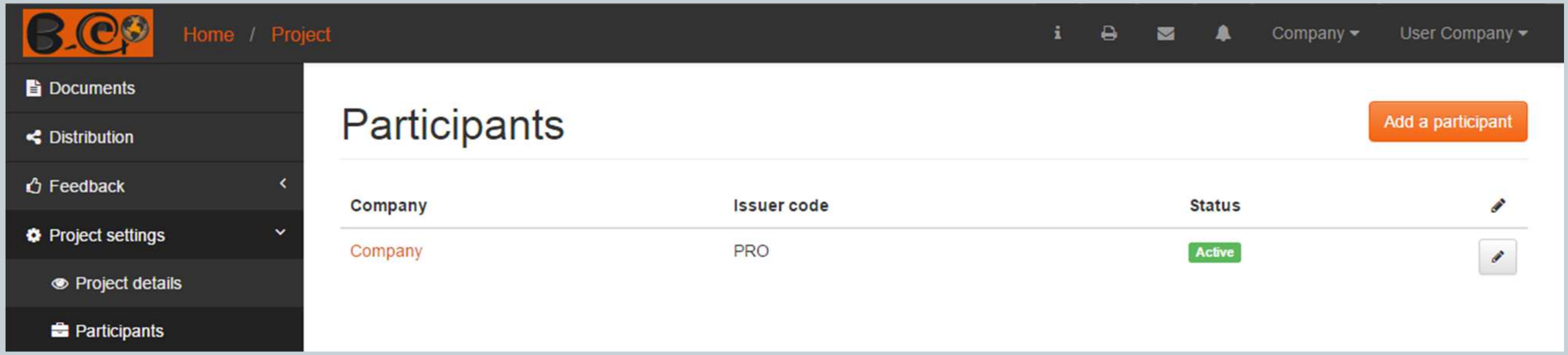
Enregistrer

Creating roles

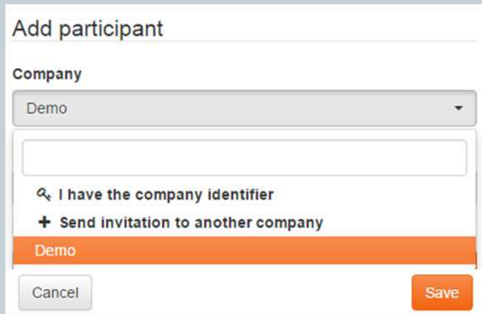




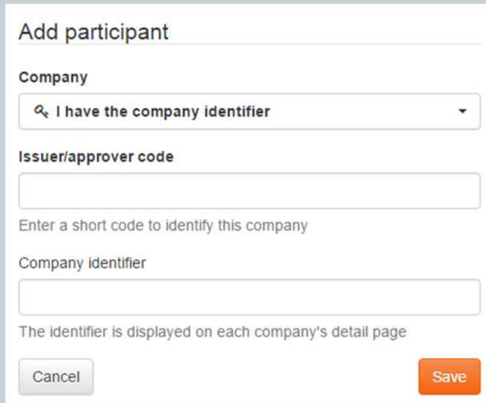
Inviting participants to a multi-company project



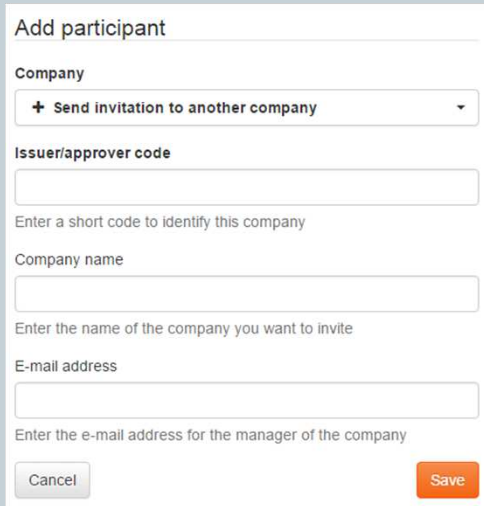
- There are several ways of adding participants to the project.
  - They'll show up in the options list if you've collaborated before.



  - You have their B-ECP identifier.



  - You can invite them by email.



Creating user groups

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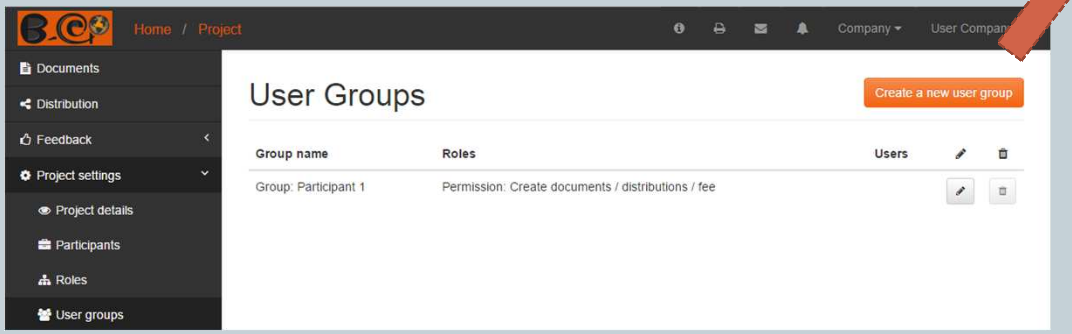
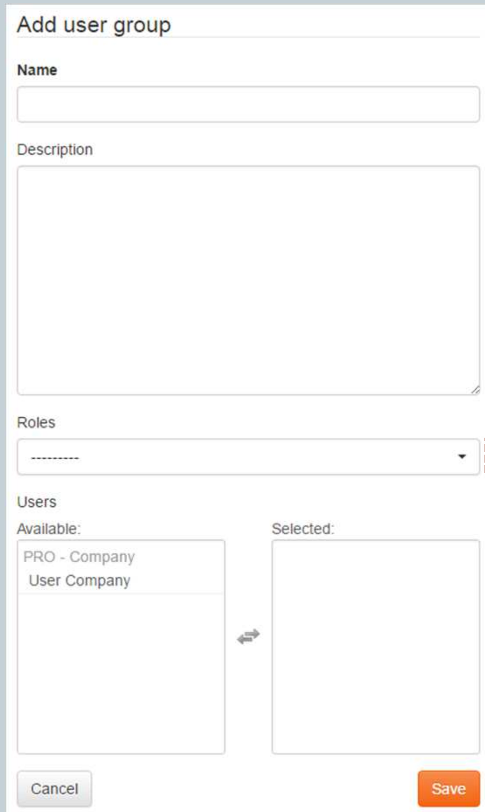
User groups

User groups are sets of users who share the same roles.

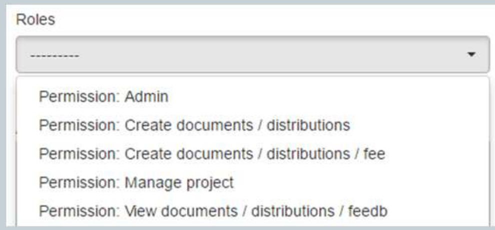
Sharing roles means that all the users in a group also have the same permissions.

If you would like the distributions in your project to be validated, you may create a user group for the users who can validate the distributions and set it as such in the project details. Such a group doesn't need to have any role.

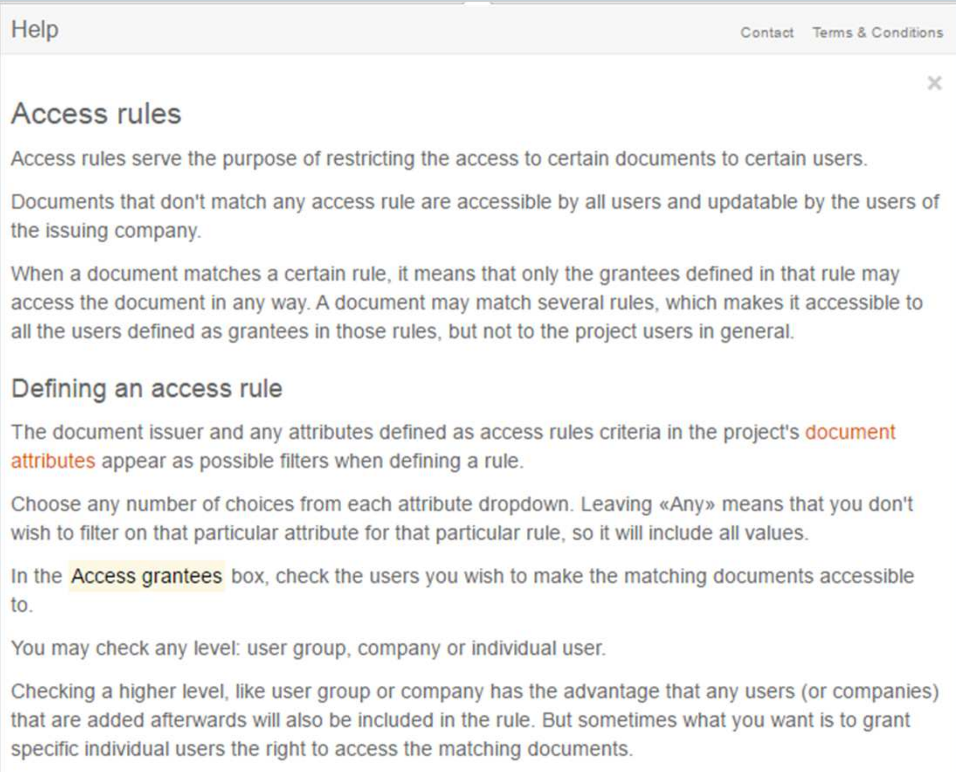




Choose the roles to assign to the group



Setting document access rules



Help

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Access rules

Access rules serve the purpose of restricting the access to certain documents to certain users.

Documents that don't match any access rule are accessible by all users and updatable by the users of the issuing company.

When a document matches a certain rule, it means that only the grantees defined in that rule may access the document in any way. A document may match several rules, which makes it accessible to all the users defined as grantees in those rules, but not to the project users in general.

Defining an access rule

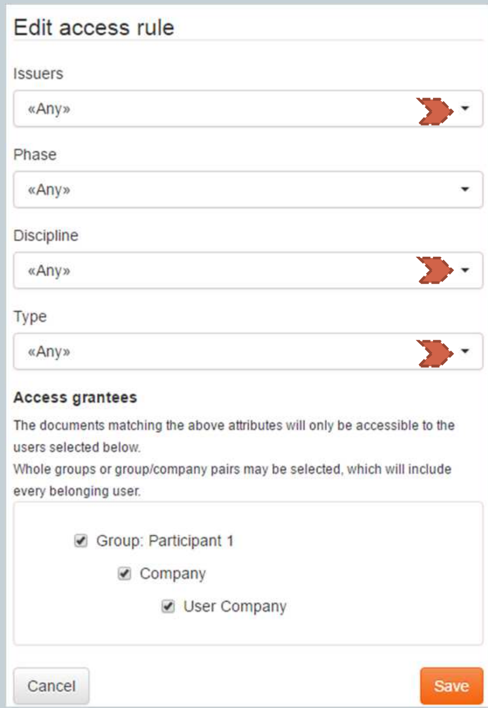
The document issuer and any attributes defined as access rules criteria in the project's document attributes appear as possible filters when defining a rule.

Choose any number of choices from each attribute dropdown. Leaving «Any» means that you don't wish to filter on that particular attribute for that particular rule, so it will include all values.

In the Access grantees box, check the users you wish to make the matching documents accessible to.

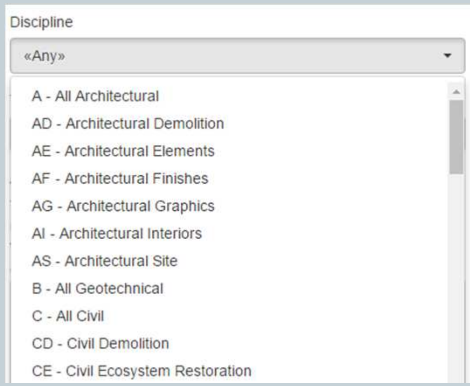
You may check any level: user group, company or individual user.

Checking a higher level, like user group or company has the advantage that any users (or companies) that are added afterwards will also be included in the rule. But sometimes what you want is to grant specific individual users the right to access the matching documents.

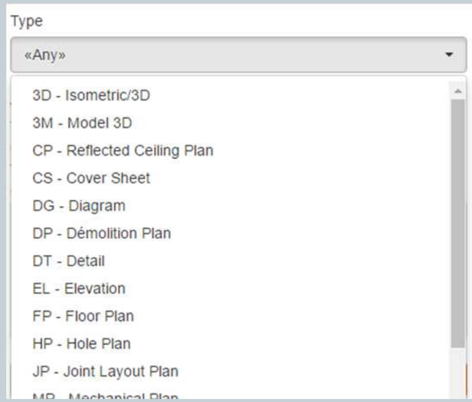


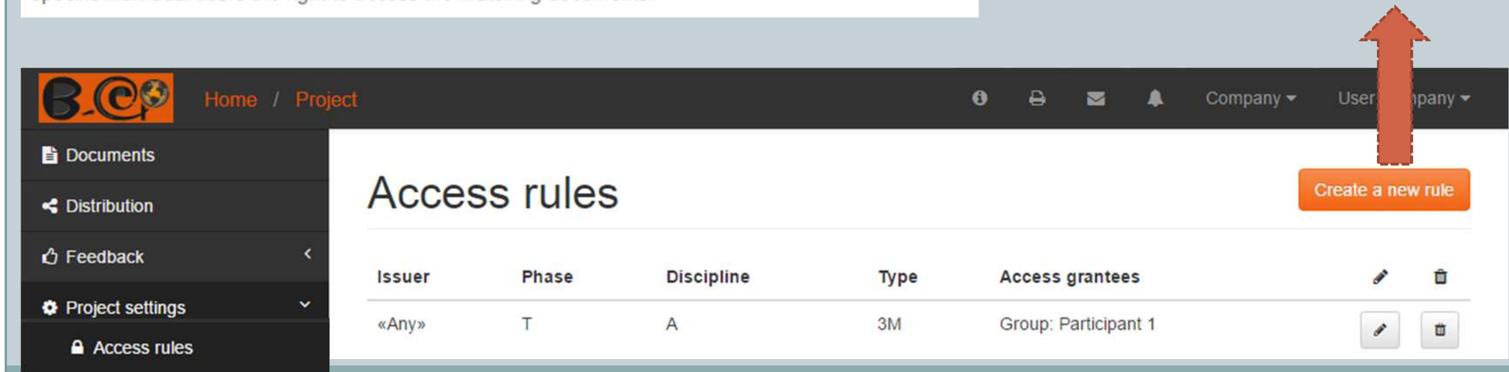
- Select one or several issuers

- Select one or several departments



- Select one or several document types





Setting the document approval rules

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Approval rules

Approval rules serve the purpose of subjecting certain documents to the approval of certain users.

The distribution of document versions will trigger the sending of feedback requests according to the defined rules.

Versions of documents that match any approval rule will be put initially in the EXPECTING FEEDBACK status. Depending on the feedback/evaluations they receive, they then may pass through the REVIEW status and should end up in the APPROVED or REJECTED status.

Versions of documents that don't match any approval rule are directly assigned the EXEMPT status upon distribution.

A document may match several rules, being subject to an equal number of approvals.

Defining an approval rule

The document issuer and any attributes defined as approval rules criteria in the project's document attributes appear as possible filters when defining a rule.

Choose any number of choices from each attribute dropdown. Leaving «Any» means that you don't wish to filter on that particular attribute for that particular rule, so it will include all values.

In the Approvers box, check all the users who may approve the matching documents. Although every included user will receive a feedback request upon the distribution of a matching document (or upon a rule change), the approval by any single one of them will fulfill the rule's approval requirement.

You may check any level: user group, company or individual user.

Checking a higher level, like user group or company has the advantage that any users (or companies) that are added afterwards will also be included in the rule. But sometimes what you want is to subject the matching documents to the approval of a specific individual user.

Edit approval rule

Issuers: PRO

Phase: «Any»

Discipline: A

Type: FP

Approvers

The documents matching the attributes above will have to be approved by the users selected below.
If a group or company is selected, then any single user in that group/company can fulfill the approval requirement.
Every user selected below will receive an approval request for matching documents upon their distribution or rule change.

- [x] Group: Participant 1
  - [x] Company
    - [x] User Company

Cancel Save

- Select one or several issuers

Issuers: «Any»

PRO - Company

- Select one or several departments

Discipline: «Any»

A - All Architectural
AD - Architectural Demolition
AE - Architectural Elements
AF - Architectural Finishes
AG - Architectural Graphics
AI - Architectural Interiors
AS - Architectural Site
B - All Geotechnical
C - All Civil
CD - Civil Demolition
CE - Civil Ecosystem Restoration

- Select one or several document types

Type: «Any»

3D - Isometric/3D
3M - Model 3D
CP - Reflected Ceiling Plan
CS - Cover Sheet
DG - Diagram
DP - Démolition Plan
DT - Detail
EL - Elevation
FP - Floor Plan
HP - Hole Plan
JP - Joint Layout Plan
MP - Mechanical Plan

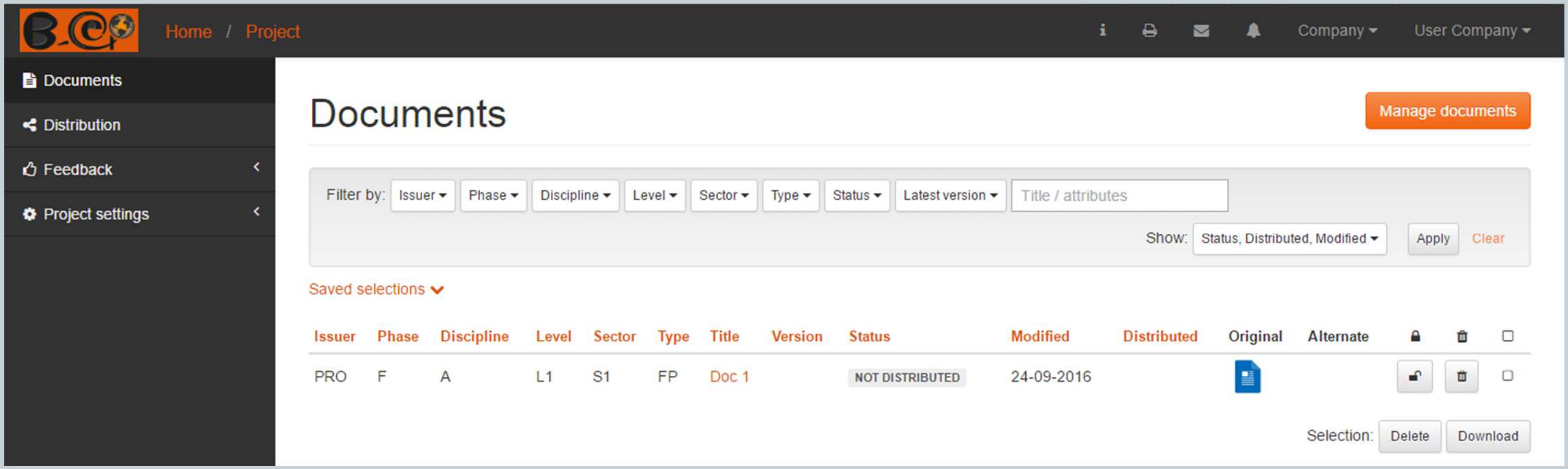
Approval rules

Approval rules

Create a new rule

Issuers	Phase	Discipline	Type	Approvers		
«Any»	1, 2, 3, 4, 5	A	FP	Group: Participant 1		

Managing your documents



- Directly retrieve any document with the help of dynamic filters.
- You may save custom selections adapted to your project.

Managing your documents

Quickly import your document list

Manage documents

Create / upload documents | Import documents

Here you can create several empty documents at once by importing their attribute values and titles in a CSV file.

It's a three-step process:

1 - Download an empty import template

Download the CSV file with the import headers. Save the file to your computer

2 - Fill out the CSV file

Open the CSV file from the first step in an office software (e.g. LibreOffice or OpenOffice - Excel won't work for now) and fill out a line for each document you want to create.
The entered attribute codes have to be already present in the project settings (document attributes).
The column for the automatic document number, when present, may be left blank to let the application assign a number (which may result in unwanted document duplication).
The format for dates is 'dd-mm-yyyy'. If you need zeros on the left of a numeric value, insert a single quote (') at the beginning of the cell.
When saving the file, keep it in the CSV format.

3 - Upload the filled out CSV file

Upload the CSV file containing the documents to be created using the input below. Lines containing attribute values that match existing documents will be ignored.

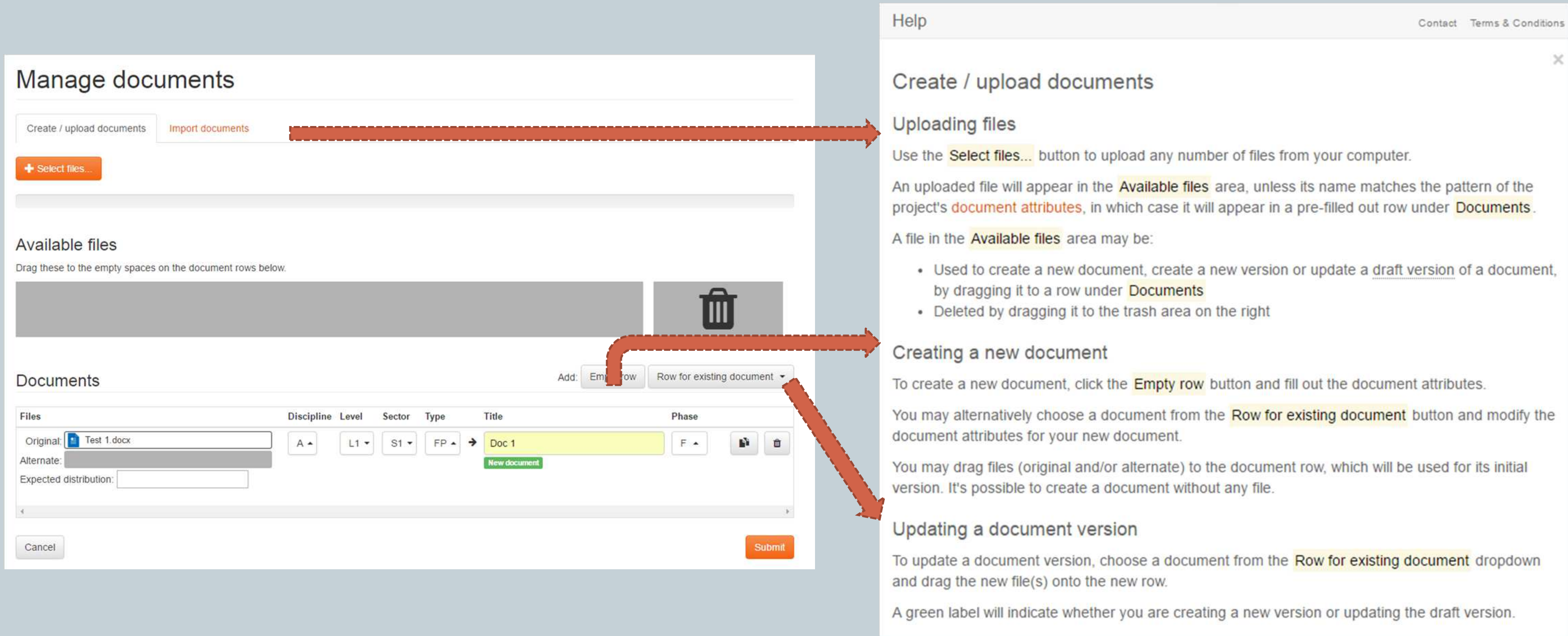
CSV file

Choisissez un fichier Aucun fichier choisi

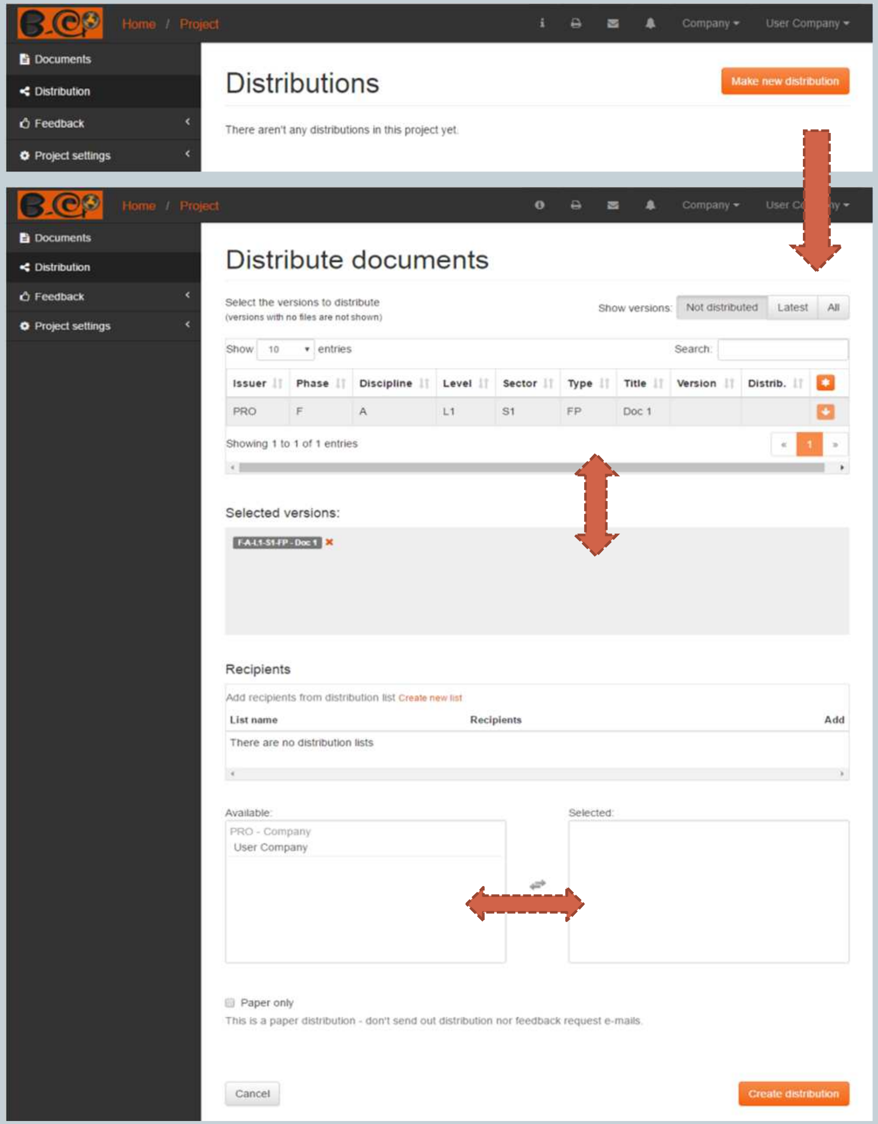
Upload file and start import

Managing your documents

New versions are automatically detected and assigned to the documents you created.



Distributing the documents' files



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Distribute documents

Distributing draft versions

A draft version can be distributed by adding it to the Selected versions area from the Not distributed version list. When a draft version is distributed it is labelled, therefore ceasing to be a draft. This cannot be undone.

Redistributing document versions

You may also distribute versions that were already distributed by choosing them from the Latest or All lists.

Doing so creates a distribution and sends the usual e-mails, but has no other effect on the document versions themselves, since they were already distributed once.

You can mix draft and definite versions in the same distribution.

Choosing the recipients

There are several ways to choose the users you want to send the distribution to:

- From a distribution list
- By clicking on the company name under Available
- By clicking on the individual user under Available

The users you choose end up in the Selected box, where you can click them to remove them from the recipients.

Paper only

Check this box if you wish to avoid the sending out of e-mails regarding this distribution.

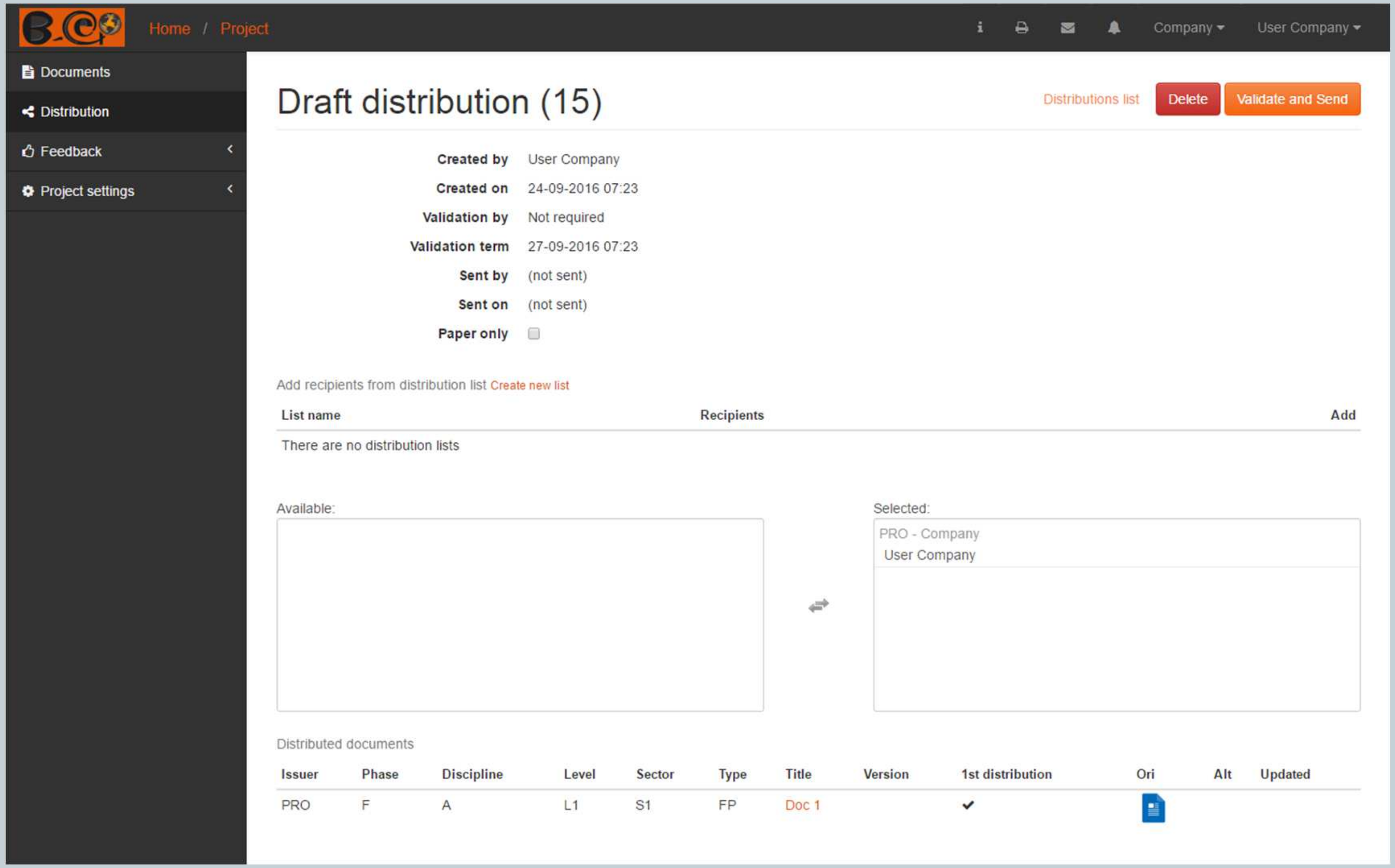
Please note that if you do so, any pertinent feedback requests for the first-time distributions will be created, but not e-mailed to the approvers.

Version approval

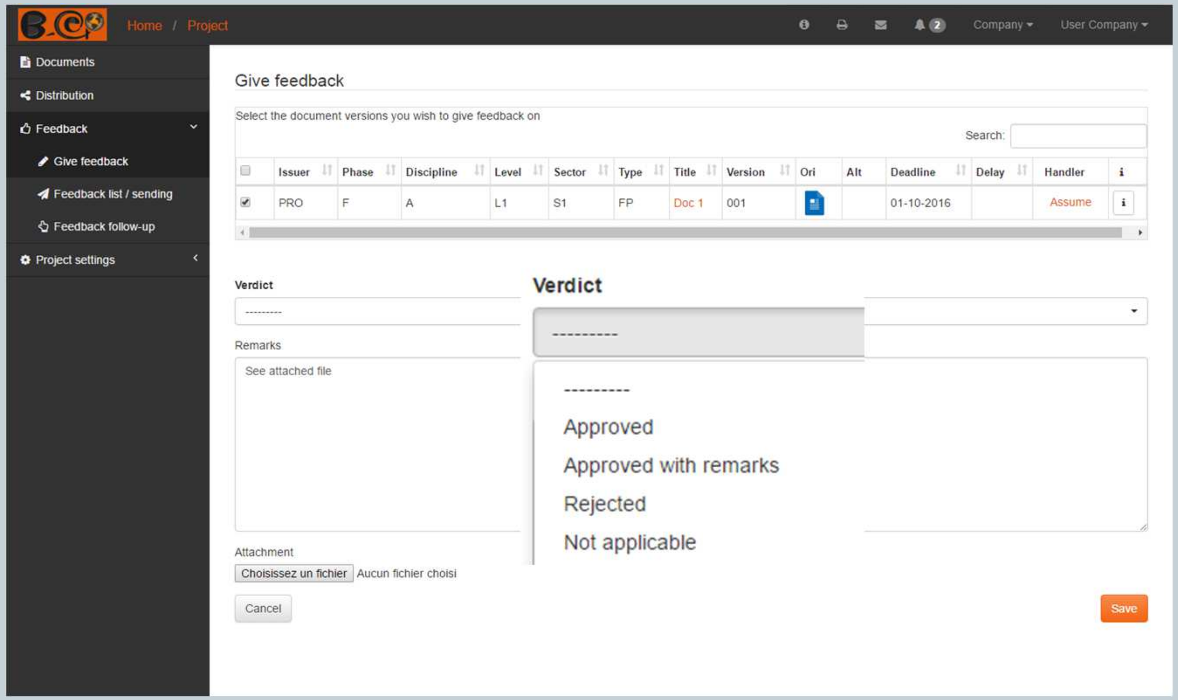
When you distribute a version for the first time, feedback request e-mails and notifications may be sent out according to the project's approval rules.

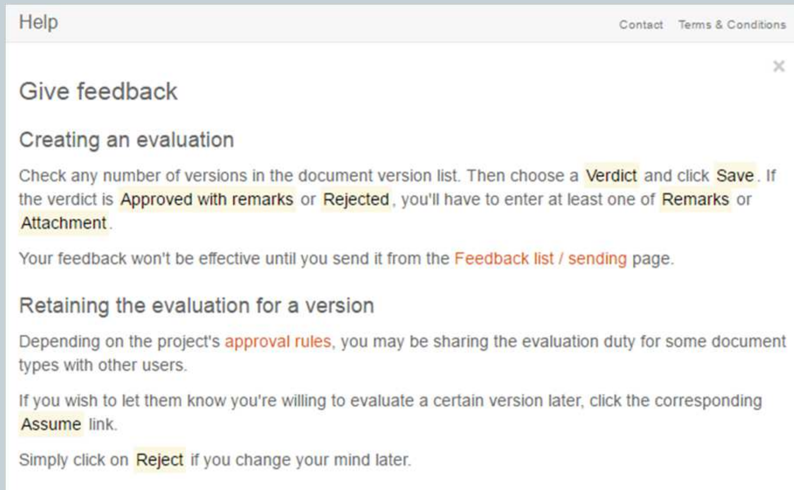
Distributing the documents' files

You may validate and send the distribution if the project doesn't have the "sending by validation group" restriction.

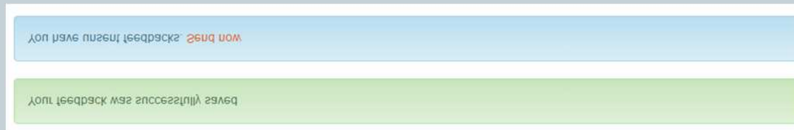


Evaluating the documents



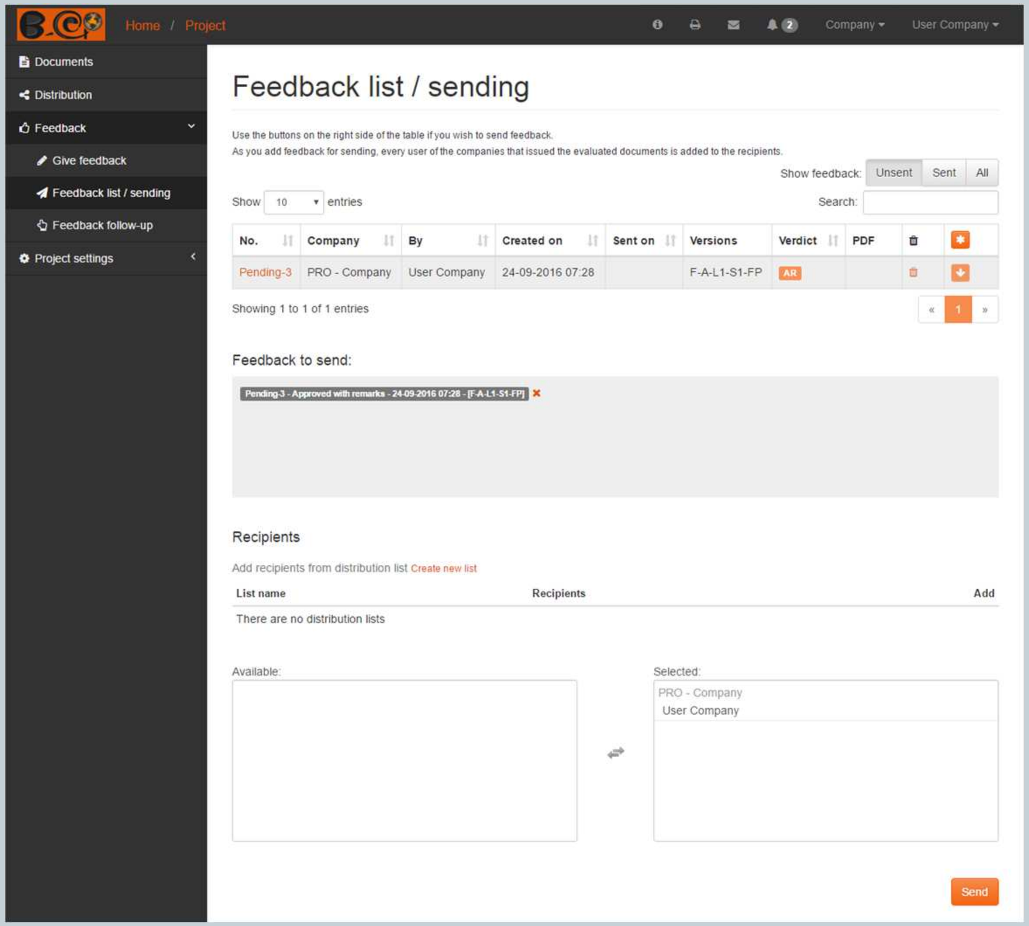


A message will let you know that your feedback was successfully registered and that you should send it.

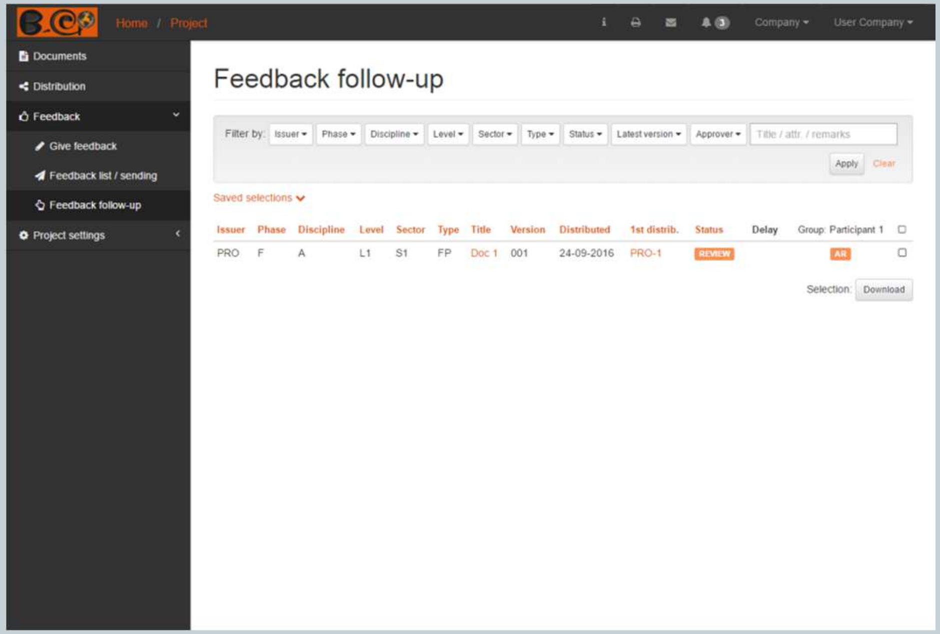


Sending and retrieving evaluations

- When you send an evaluation the users who issued the corresponding documents are automatically notified.
- You may also choose arbitrary recipients.

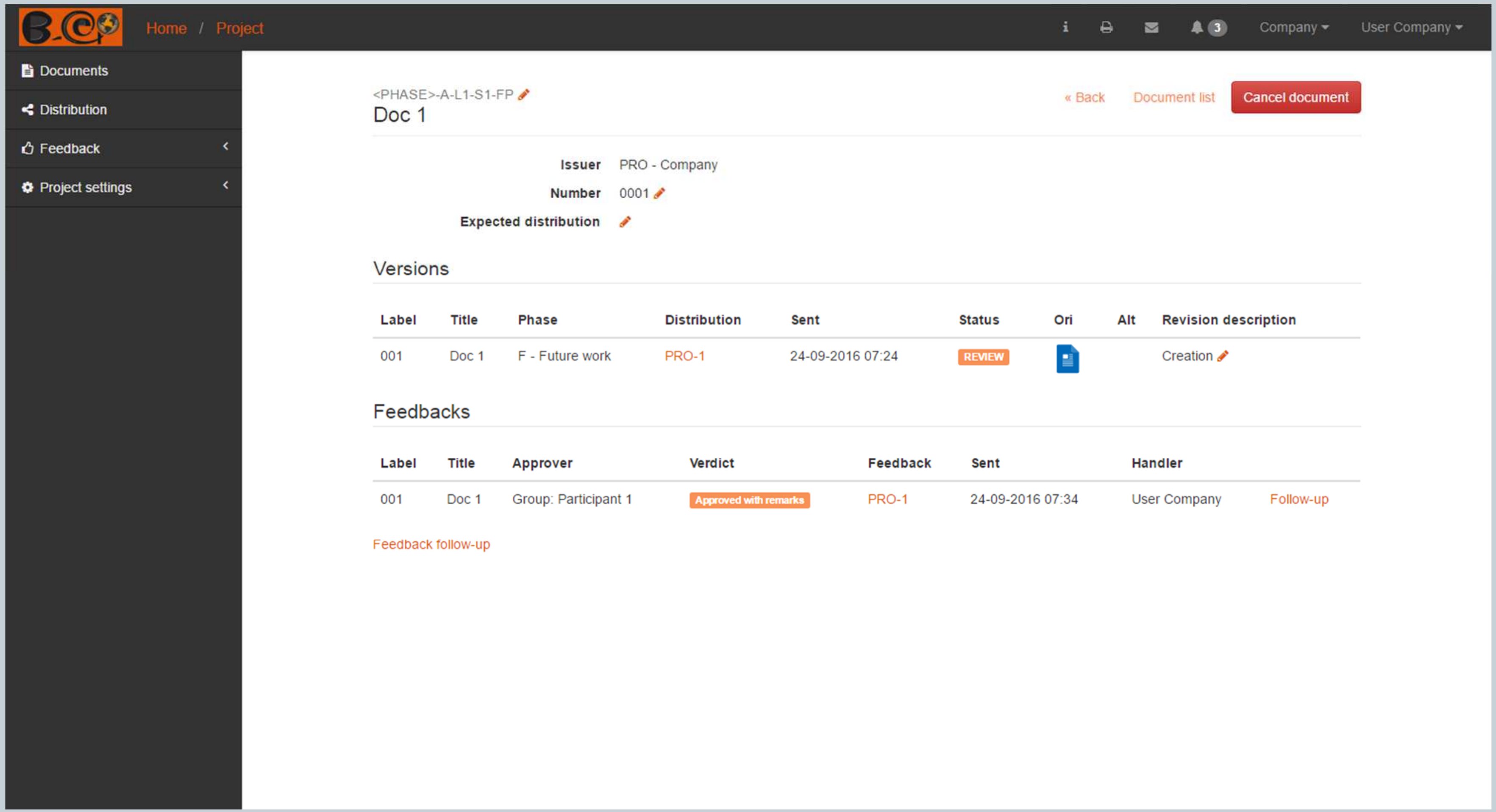


- Retrieve any evaluation with the help of dynamic filters.
- You may save custom selections adapted to your project.

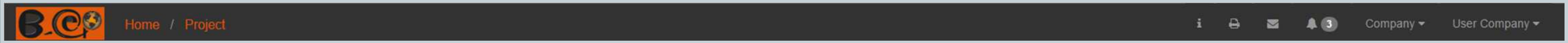


Following the evolution of a document

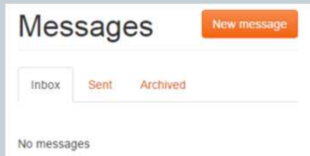
Document version and feedback follow-up

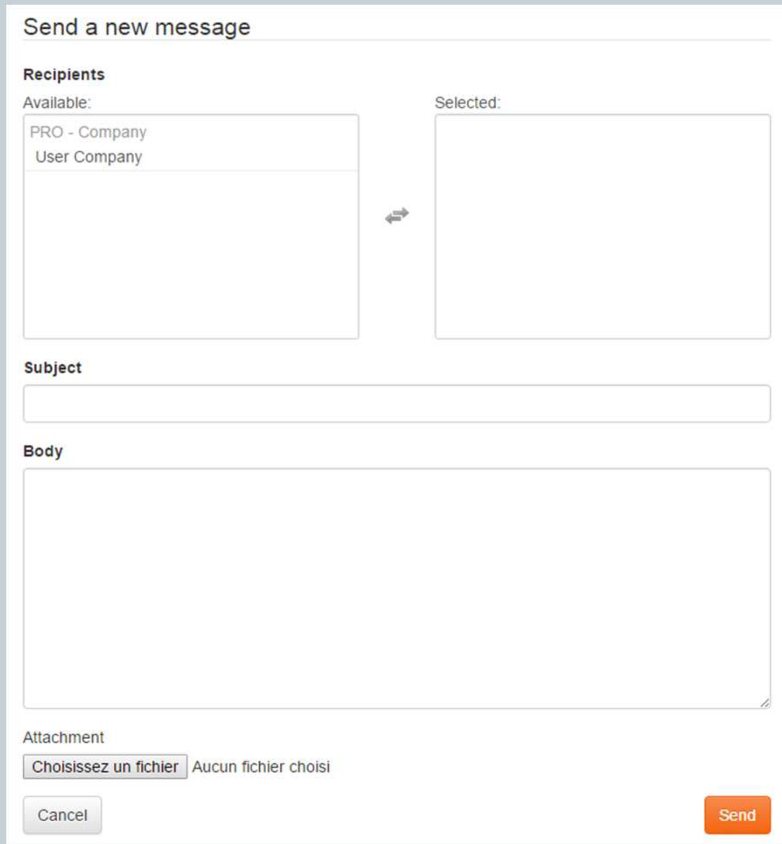


Information and communication extras

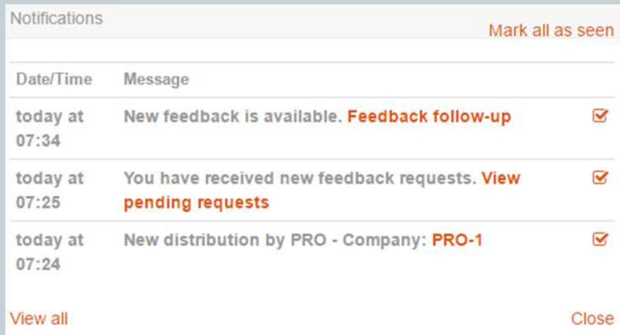


- Project's internal messaging service.





- Interactive notifications.



- Dynamic help adapted to each process.

- Printing of the current page or of saved selections.