

B-ECP

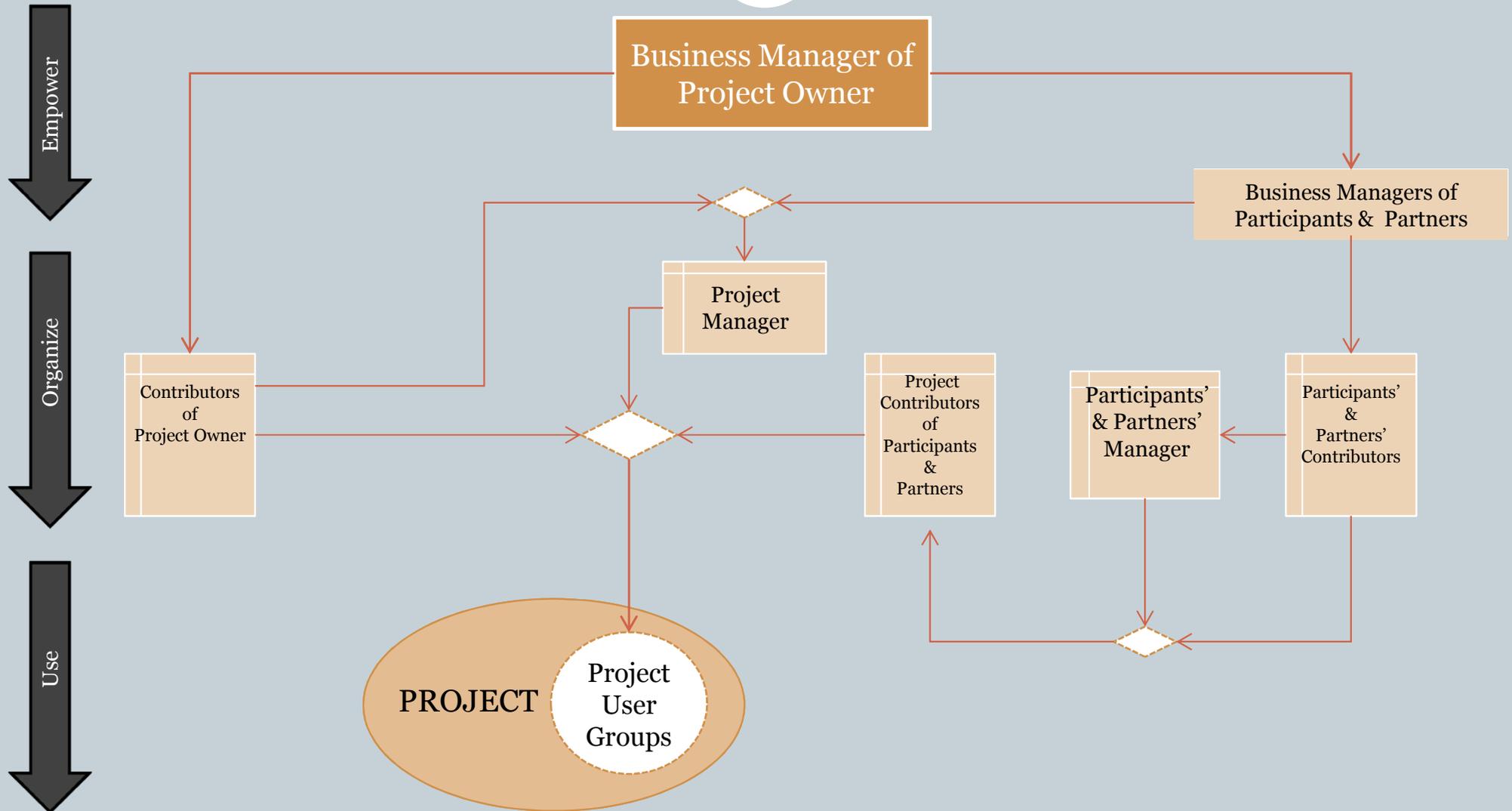
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INTUITIVE AND CUSTOMIZABLE DOCUMENT MANAGEMENT

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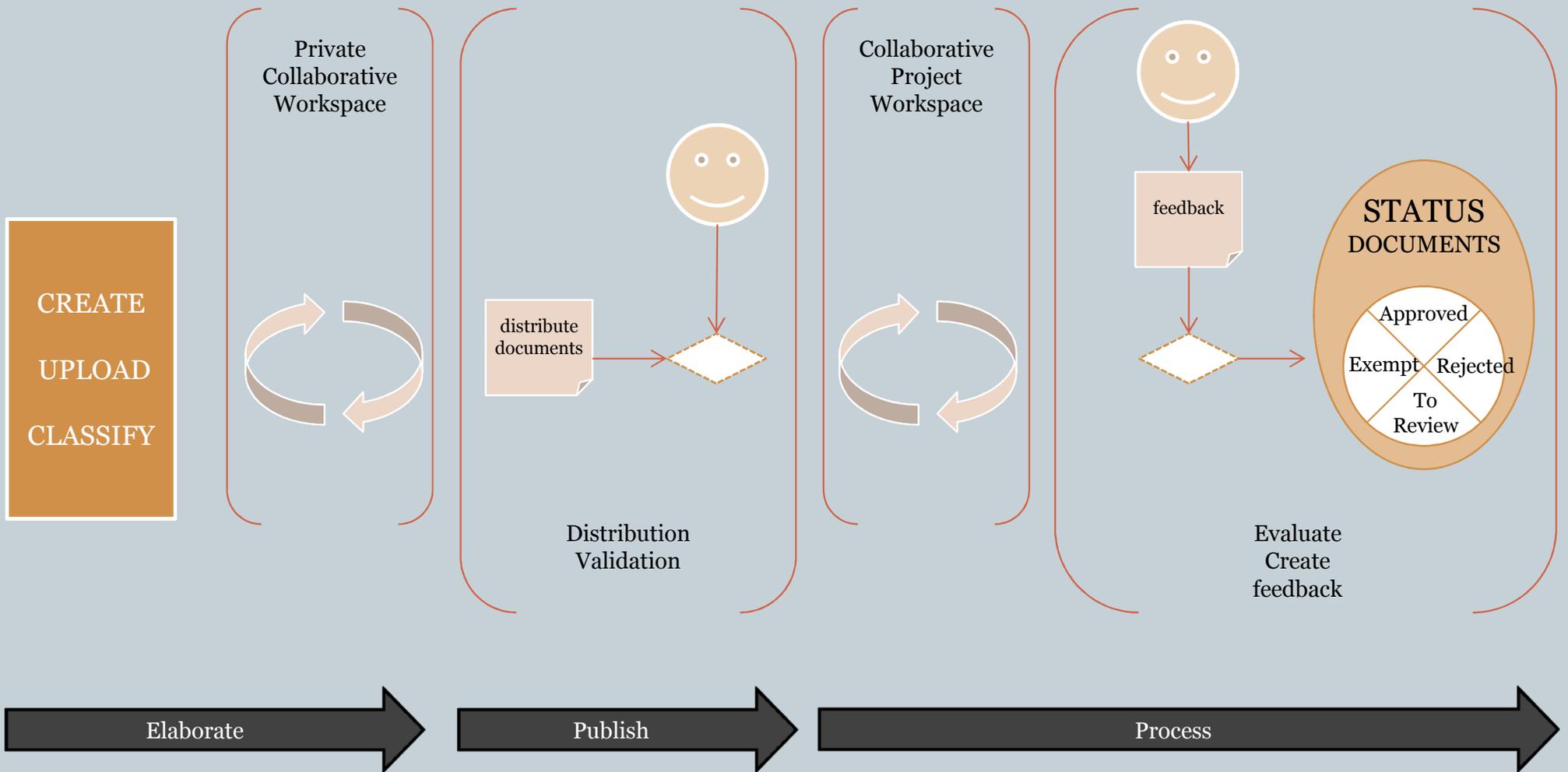
Organization of contributors

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Document Workflow

3



Registration

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B-ECP
Document management
Registration

Select your language
English

If you're not a manager of your company, please wait for an invitation e-mail instead of registering.

Create an account **B-ECP client**

You will create a new user account and a new company.

Personal information

First name **Email address**

Last name **Password**

Phone **Password (again)**

Company information

Name **Country**

Invitation token **I'm Human**

I accept the [terms and conditions](#)

If you were invited by another company enter the invitation code here. This is not meant for coupon codes.

Fields with labels in **bold** are required.

Register

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



Company User Company

Projects

Create a new project

Project name	Identifier	Issuer code	Managing company	Manager	Logo
Exemple projet (closed)		SOC	ETELEC C+		
Project		PRO	Company	User Com	

New project

Managing your company's account

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

The screenshot shows the 'Company' page with the following details:

- Company Information:** Identifier, Phone, E-mail, Address (France).
- Account Overview:** Manage subscription, Transactions.
- Subscription:** Plan: do not use (1 GB), Unlimited number of own projects, Unlimited number of users and partnerships, Storage for own projects limited to 1 GB. State: Valid. Expiry date: 22-10-2016.
- Usage:** Capacity: 1.0 GB, Used: 49.9 KB (0.0%), Free: 1.024.0 MB.
- Storage usage:** Click
- Usage per project:**

Project	Storage used
Project	0.0 bytes
Projecto pt	25.0 KB
Projecto	25.0 KB

Edit company details

Name	Address
<input type="text" value="Company"/>	<input type="text"/>
Email	Postal code
<input type="text"/>	<input type="text"/>
Phone	City
<input type="text"/>	<input type="text"/>
Website	Country
<input type="text"/>	<input type="text" value="France"/>
Logo	
<input type="button" value="Choisissez un fichier"/> Aucun fichier choisi	
<input type="button" value="Cancel"/>	<input type="button" value="Save"/>

Changing your subscription; retrieving your orders and invoices.

The screenshot shows the 'Company' page with the following details:

- Company Information:** Identifier, Phone, E-mail, Address (France).
- Account Overview:** Manage subscription, Transactions.
- Current Subscription:** Plan: do not use (1 GB), Unlimited number of own projects, Unlimited number of users and partnerships, Storage for own projects limited to 1 GB. State: Valid. Expiry date: 22-10-2016. Price per month: €1.00 excl. VAT. Payment method: Manual bank transfer. Billing details: societe-becp.
- Subscribe a different plan:**

Plan	Price
S (3 GB) Unlimited number of own projects. Unlimited number of users and partnerships. Storage for own projects limited to 3 GB.	€15 per month excl. VAT
M (20 GB) Unlimited number of own projects. Unlimited number of users and partnerships. Storage for own projects limited to 20 GB.	€45 per month excl. VAT
L (100 GB)	€75

The screenshot shows the 'Company' page with the following details:

- Company Information:** Identifier, Phone, E-mail, Address (France).
- Account Overview:** Manage subscription, Transactions.
- Transaction History:**

Date	Document	Description	Debit	Credit	Balance	Action
Order is reverse chronological						
Current balance: €0.00						
22-09-2016	Invoice / receipt BECP-F-000009	Payment of Order / pro-forma BECP-F-000003 by Bank transfer	€1.20	€0.00		
22-09-2016	Order / pro-forma BECP-F-000003	Subscription of plan do not use (1 GB) for 1 month(s)		€1.20	€1.20	

Managing your company's users

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Name	E-mail	Phone	Company manager	
User Company	societe-becp@		<input checked="" type="checkbox"/>	<input type="button" value="x"/>

There are several ways of creating your users.

➤ Quickly import all of them

Import company users

Here you can create several company users at once by importing their data 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 company user you want to create. The last two columns are optional. Entering 'Y' or '1' in the last column means the user should be a company manager.

When saving the file, keep it in the CSV format.

3 - Upload the filled out CSV file

Upload the CSV file containing the company users to be created using the input below.

Successfully imported users will be invited by e-mail to join your company.

CSV file

Choisissez un fichier | Aucun fichier choisi

Upload file and start import

➤ Create each one individually

Create a new user

First name

Last name

E-mail address

Phone

Company manager

Cancel

Create user

Creating a project / Project details

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- 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.

Create a new project

Name
[Text input]

Identifier
[Text input]

The project identifier for your company's internal use (optional)

Issuer code
PRO
Your company's issuer code for the documents in this project

Based on
Empty project
Select a template or project to copy the structure from

Manager
User Company

Version label format
Numeric starting with "001"
Select a format for the version label

Approval by issuer company
May the issuing company also be the approver for a document?

Distribution validation term (days)
3
Term for distributions to be validated
[number=term (in days) | 0=same day | empty=unlimited]

Feedback term (days)
7
Term for approvers to give feedback on a document
[number=term (in days) | 0=same day | empty=unlimited]

Correction term (days)
15
Term to issue a corrected version after negative feedback (AR or R)
[number=term (in days) | 0=same day | empty=unlimited]

File links validity (days)
[Text input]
Validity of unprotected file links
[number=validity (in days) | 0=don't send links | empty=links never expire]

Attribute separator
-
Which character should be used to divide the various attributes in document and file names?

Document number by
Project

Document number width
4
No. of digits of the document number

Editable document number
Can the document number be changed?

Concatenate document number
Should the document number and the previous attribute be concatenated (in file names, etc.?)

Address
[Text input]

Postal code
[Text input]

City
[Text input]

Country
United Kingdom

Main language
English
The language for email and pdf generation

Logo
[Chisissez un fichier] Aucun fichier choisi

Cancel Create project

Project

Project list Close project Download Duplicate Delete Edit details

Your company's values

- Project identifier: [Edit]
- Issuer code: PRO [Edit]

Attribute separator: -

Document number by: Project

Document number width: 4

Editable document number: Yes

Concatenate document number: No

Address: United Kingdom

Version label format: Numeric starting with "001"

Validators group: Distribution validation not required

Approval by issuer: No

Distribution validation term: 3 days

Feedback term: 7 days

Correction term: 15 days

File links validity: Links never expire

Main language: English

Project companies and users Manage your users E-mail preferences

Company / User	E-mail	Phone	Company manager	Active
PRO - Company				
User Company	societe@...		✓	✓

Selecting the users involved in the project & email preferences

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The screenshot shows a web application interface for project settings. On the left is a dark sidebar with navigation options: Documents, Distribution, Feedback, and Project settings. The main content area is titled 'Project' and contains several sections:

- Your company's values:** Project identifier (edit icon), Issuer code: PRO (edit icon).
- Version label format:** Numeric starting with "001"
- Validators group:** Distribution validation not required
- Approval by issuer:** No
- Distribution validation term:** 3 days
- Feedback term:** 7 days
- Correction term:** 15 days
- File links validity:** Links never expire
- Main language:** English

Below these settings are three tabs: 'Project companies and users', 'Manage your users', and 'E-mail preferences'. The 'E-mail preferences' tab is active and contains a list of notification options with checkboxes:

- Distribution rejected email: Receive an email when a new distribution created by me is rejected by a validator
- Distribution recipient email: Receive an email when a new distribution is sent including me in the recipients
- Feedback request email: Receive an email when new versions are distributed which require my feedback
- Feedback recipient email: Receive an email when a new feedback is sent including me in the recipients
- Message received email: Receive an email when you receive an in-app message from another user
- Daily digest email: Receive a daily email summarizing close deadlines that concern me and other events

A 'Cancel' button is located at the bottom of this section. A red double-headed arrow points from this section to the 'Manage your users' tab.

The 'Manage your users' tab is active and contains the following text:

Select the users you want to involve in this project
You may choose below among the users of your company and of its partners.
The managers of your company cannot be removed from the project.

Below this text are two lists:

- Available:** A list of users with red dashed boxes over their names. Visible entries include 'Demo', 'demo@...', and 'utilisateur1.d...m'.
- Selected:** A list of users that has been selected. Visible entries include 'Company' and 'User Company'.

A red double-headed arrow points from the 'Available' list to the 'Selected' list. At the bottom of the 'Manage your users' section are 'Cancel' and 'Save' buttons.

Documents codification

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

Document attributes

Attributes are a way of classifying documents. Users may filter and sort documents on them.

The name of each document and of each file is built by concatenating the document attributes defined for the project.

There are several types of attributes:

Home / Project

Documents
Distribution
Feedback
Project settings
Project details
Participants
Roles
User groups
Distribution lists
Document attributes
Access rules
Approval rules

Document attributes

The attributes are meant to form an unique key for each document. Add one attribute of type 'Title' and another of type 'Version' if you don't need any special classification.

Attributes

- Phase
- Discipline
- Level
- Sector
- Type

Add document attribute

Name:

The name of the attribute. This will be the field label and column header.

Type:

- Manual
- Text
- Select
- Document
 - Document number
 - Issuer code
- Version
 - Version label
 - Title
 - Phase
 - Date

Buttons: Add new, Edit, Delete, Cancel

Choices

- 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
- CF - Civil Flood Control
- CG - Civil Grading
- CH - Civil Shore Protection
- CI - Civil Improvements
- CN - Civil Navigation
- CO - Civil Operation and Maintenance

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

Buttons: Add new, Edit, Delete, Sort choices alphabetically

Documents codification

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Attributes

Add document attribute

Name

The name of the attribute. This will be the field label and column header.

Type

-
- Manual
 - Text
 - Select
- Document
 - Document number
 - Issuer code
- Version
 - Version label
 - Title
 - Phase
 - Date

Manual
Text
Select

Document
Document number
Issuer code

Manual attributes

Manual attributes have to be filled in when creating a document, along with the document title.

Text

For this type of attribute the user enters an arbitrary text. You may give a default text, which will be pre-filled in the input. If you indicate that it's always the same text (**Fixed**), the input won't be shown when creating a document.

Select

In this case the user will be given a list of values to choose from. You set the possible values in the **Choices** box on the right.

Attributes of type *Select* may be criteria for the document **access rules**.

They may also be criteria for the document **approval rules**.

Document dependant attributes

Document attributes' values are, by default, drawn automatically from the document data.

Document number

Documents are numbered automatically by default, even if this type of attribute is left out.

Including an attribute of this type has two effects:

- you may force a specific number when creating the document
- the document number will be part of the name and file names of every document

Keep in mind that in any case you can change the number of any document on its detail page, if allowed in the **project details**.

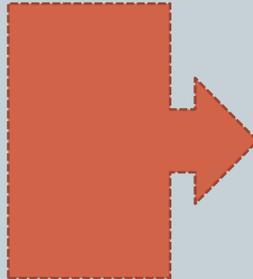
Issuer code

Including an attribute of this type makes the issuer code of the issuing company part of the document name and respective file names.

The issuer code is always an access and approval rules criterion.

Documents codification

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Version
Version label
Title
Phase
Date



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

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Help Contact Terms & Conditions

Roles

Roles are sets of permissions which are given to **user groups**.

Each user group may have several roles.

Each user has all the permissions of all the roles of all the groups he/she belongs to.

Add role

Name

Permissions

- manage access rules
- manage approval rules
- create distributions
- manage distribution lists
- send distributions
- view distributions
- manage document attribute choices
- manage document attributes
- change documents
- view documents
- add feedback
- view feedback
- manage participants
- edit project details
- download project
- manage roles
- manage user groups

Home / Project

Documents
Distribution
Feedback
Project settings
Project details
Participants
Roles
User groups
Distribution lists
Document attributes
Access rules
Approval rules

Roles

Create a new role

Role name	Permissions		
Permission: Admin	manage access rules, manage approval rules, create distributions, manage distribution lists, send distributions, view distributions, manage document attribute choices, manage document attributes, change documents, view documents, add feedback, view feedback, manage participants, edit project details, download project, manage roles, manage user groups		
Permission: Create documents / distributions	create distributions, manage distribution lists, send distributions, view distributions, change documents, view documents		
Permission: Create documents / distributions / fee	create distributions, manage distribution lists, send distributions, view distributions, change documents, view documents, add feedback, view feedback		
Permission: Manage project	manage access rules, manage approval rules, manage distribution lists, manage document attribute choices, manage document attributes, manage participants, edit project details, download project, manage roles, manage user groups		
Permission: View documents / distributions / feedb	view distributions, view documents, view feedback		

Inviting participants to a multi-company project

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The screenshot shows the 'Participants' page in the B-ECP system. The left sidebar contains navigation options: Documents, Distribution, Feedback, Project settings, Project details, and Participants. The main content area displays a table of participants. The table has three columns: 'Company', 'Issuer code', and 'Status'. One participant is listed with 'Company' as 'Company', 'Issuer code' as 'PRO', and 'Status' as 'Active'. An 'Add a participant' button is located in the top right corner of the table area.

- There are several ways of adding participants to the project.

- They'll show up in the options list if you've collaborated before.

This screenshot shows the 'Add participant' form. The 'Company' dropdown menu is open, showing 'Demo' as the selected option. Below the dropdown, there is a search option 'I have the company identifier' and a '+ Send invitation to another company' button. The 'Demo' option is highlighted in orange. There are 'Cancel' and 'Save' buttons at the bottom.

- You have their B-ECP identifier.

This screenshot shows the 'Add participant' form with the 'I have the company identifier' search option selected. The 'Company' dropdown menu is open, showing 'I have the company identifier' as the selected option. Below the dropdown, there is a search option 'I have the company identifier' and a '+ Send invitation to another company' button. The 'I have the company identifier' option is highlighted in orange. There are 'Cancel' and 'Save' buttons at the bottom.

- You can invite them by email.

This screenshot shows the 'Add participant' form with the '+ Send invitation to another company' option selected. The 'Company' dropdown menu is open, showing '+ Send invitation to another company' as the selected option. Below the dropdown, there is a search option 'I have the company identifier' and a '+ Send invitation to another company' button. The '+ Send invitation to another company' option is highlighted in orange. There are 'Cancel' and 'Save' buttons at the bottom.

Creating user groups

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Help

Contact Terms & Conditions

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.

Group name	Roles	Users
Group: Participant 1	Permission: Create documents / distributions / fee	

Add user group

Name

Description

Roles

Users

Available:

- PRO - Company
- User Company

Selected:

Cancel Save

Choose the roles to assign to the group

Roles

- Permission: Admin
- Permission: Create documents / distributions
- Permission: Create documents / distributions / fee
- Permission: Manage project
- Permission: View documents / distributions / feedb

Setting document access rules

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Help Contact Terms & Conditions

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.

Edit access rule

Issuers

«Any»

Phase

«Any»

Discipline

«Any»

Type

«Any»

Access grantees

The documents matching the above attributes will only be accessible to the users selected below.

Whole groups or group/company pairs may be selected, which will include every belonging user.

- Group: Participant 1
 - Company
 - 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



Home / Project

Documents

Distribution

Feedback

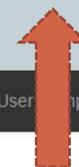
Project settings

Access rules

Access rules

Issuer	Phase	Discipline	Type	Access grantees		
«Any»	T	A	3M	Group: Participant 1		

Create a new rule



Setting the document approval rules

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Help Contact Terms & Conditions

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.

Group: Participant 1
 Company
 User Company

Cancel Save

Select one or several issuers

Issuers
«Any»
PRO - Company

Select one or several departments

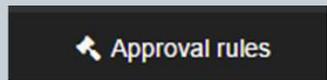
Discipline
«Any»

- 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

Create a new rule

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

Managing your documents

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The screenshot displays a web application interface for document management. On the left is a dark sidebar with navigation links: Documents, Distribution, Feedback, and Project settings. The top header is dark and contains the B-EC logo, navigation links (Home / Project), and user information (Company, User Company). The main content area is titled 'Documents' and features a 'Manage documents' button. Below the title is a filter section with dropdown menus for Issuer, Phase, Discipline, Level, Sector, Type, Status, and Latest version, along with a text input for 'Title / attributes'. A 'Show:' dropdown is set to 'Status, Distributed, Modified', with 'Apply' and 'Clear' buttons. Below the filters is a 'Saved selections' dropdown. The document list table has columns: Issuer, Phase, Discipline, Level, Sector, Type, Title, Version, Status, Modified, Distributed, Original, Alternate, and action icons (lock, trash, checkbox). One document is listed: PRO, F, A, L1, S1, FP, Doc 1, NOT DISTRIBUTED, 24-09-2016. At the bottom right, there are 'Delete' and 'Download' buttons.

Issuer	Phase	Discipline	Level	Sector	Type	Title	Version	Status	Modified	Distributed	Original	Alternate	Lock	Trash	Checkbox
PRO	F	A	L1	S1	FP	Doc 1		NOT DISTRIBUTED	24-09-2016						<input type="checkbox"/>

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

Managing your documents

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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

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

Manage documents

Create / upload documents [Import documents](#)

[+ Select files...](#)

Available files

Drag these to the empty spaces on the document rows below.

Documents

Add: [Empty row](#) [Row for existing document](#)

Files	Discipline	Level	Sector	Type	Title	Phase
Original: <input type="text" value="Test 1.docx"/>	<input type="text" value="A"/>	<input type="text" value="L1"/>	<input type="text" value="S1"/>	<input type="text" value="FP"/>	<input type="text" value="Doc 1"/>	<input type="text" value="F"/>

Alternate:

Expected distribution:

[Cancel](#) [Submit](#)

Help [Contact](#) [Terms & Conditions](#)

Create / upload documents

Uploading files

Use the **Select files...** button to upload any number of files from your computer.

An uploaded file will appear in the **Available files** area, unless its name matches the pattern of the project's **document attributes**, in which case it will appear in a pre-filled out row under **Documents**.

A file in the **Available files** area may be:

- Used to create a new document, create a new version or update a draft version of a document, by dragging it to a row under **Documents**
- Deleted by dragging it to the trash area on the right

Creating a new document

To create a new document, click the **Empty row** button and fill out the document attributes.

You may alternatively choose a document from the **Row for existing document** button and modify the document attributes for your new document.

You may drag files (original and/or alternate) to the document row, which will be used for its initial version. It's possible to create a document without any file.

Updating a document version

To update a document version, choose a document from the **Row for existing document** dropdown and drag the new file(s) onto the new row.

A green label will indicate whether you are creating a new version or updating the draft version.

Distributing the documents' files

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Home / Project

Documents

Distribution

Feedback

Project settings

Distributions

Make new distribution

There aren't any distributions in this project yet.

Home / Project

Documents

Distribution

Feedback

Project settings

Distribute documents

Select the versions to distribute (versions with no files are not shown)

Show versions: Not distributed Latest All

Show 10 entries Search:

Issuer	Phase	Discipline	Level	Sector	Type	Title	Version	Distrib.
PRO	F	A	L1	S1	FP	Doc 1		

Showing 1 to 1 of 1 entries

Selected versions:

F-A-L1-S1-FP - Doc 1

Recipients

Add recipients from distribution list [Create new list](#)

List name	Recipients	Add
There are no distribution lists		

Available:

PRO - Company
User Company

Selected:

Paper only
This is a paper distribution - don't send out distribution nor feedback request e-mails.

Cancel Create distribution

Help

Contact Terms & Conditions

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

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

The screenshot shows a web application interface for managing document distributions. On the left is a dark sidebar with navigation options: Documents, Distribution, Feedback, and Project settings. The main content area is titled "Draft distribution (15)" and includes several metadata fields: Created by (User Company), Created on (24-09-2016 07:23), Validation by (Not required), Validation term (27-09-2016 07:23), Sent by (not sent), Sent on (not sent), and Paper only (checkbox). Below these fields is a section for adding recipients from a distribution list, with a "Create new list" link. A table with columns "List name" and "Recipients" shows "There are no distribution lists". To the right, there are two boxes: "Available:" (empty) and "Selected:" (containing "PRO - Company" and "User Company"). At the bottom, a table titled "Distributed documents" lists document details.

Issuer	Phase	Discipline	Level	Sector	Type	Title	Version	1st distribution	Ori	Alt	Updated
PRO	F	A	L1	S1	FP	Doc 1		✓			

Evaluating the documents

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Home / Project

Give feedback

Select the document versions you wish to give feedback on

	Issuer	Phase	Discipline	Level	Sector	Type	Title	Version	Ori	Alt	Deadline	Delay	Handler	i
<input checked="" type="checkbox"/>	PRO	F	A	L1	S1	FP	Doc 1	001			01-10-2016		Assume	i

Verdict

Verdict

Approved

Approved with remarks

Rejected

Not applicable

Attachment

Choisissez un fichier

Aucun fichier choisi

Cancel

Save

Help

Contact Terms & Conditions

Give feedback

Creating an evaluation

Check any number of versions in the document version list. Then choose a **Verdict** and click **Save**. If the verdict is **Approved with remarks** or **Rejected**, you'll have to enter at least one of **Remarks** or **Attachment**.

Your feedback won't be effective until you send it from the **Feedback list / sending** page.

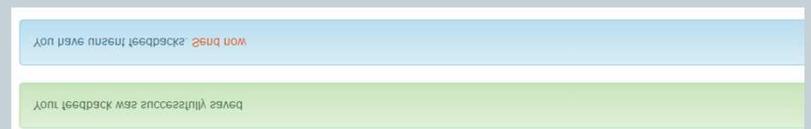
Retaining the evaluation for a version

Depending on the project's **approval rules**, you may be sharing the evaluation duty for some document types with other users.

If you wish to let them know you're willing to evaluate a certain version later, click the corresponding **Assume** link.

Simply click on **Reject** if you change your mind later.

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



Sending and retrieving evaluations

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

The screenshot shows the 'Feedback list / sending' page. It features a table with columns: No., Company, By, Created on, Sent on, Versions, Verdict, PDF, and actions. A single entry is shown: 'Pending-3' issued by 'PRO - Company' and 'User Company' on '24-09-2016 07:28' with version 'F-A-L1-S1-FP' and verdict 'AR'. Below the table is a 'Feedback to send:' section with a text area containing the entry details. At the bottom, there is a 'Recipients' section with 'Available:' and 'Selected:' lists, where 'PRO - Company' and 'User Company' are already selected. A 'Send' button is at the bottom right.

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

The screenshot shows the 'Feedback follow-up' page. It includes a filter bar with dropdowns for 'Filter by: Issuer', 'Phase', 'Discipline', 'Level', 'Sector', 'Type', 'Status', 'Latest version', and 'Approver', along with a search field for 'Title / attr. / remarks'. Below the filter is a table of 'Saved selections' with columns: Issuer, Phase, Discipline, Level, Sector, Type, Title, Version, Distributed, 1st distrib., Status, Delay, Group, and Participant 1. A single entry is shown: 'PRO' (Issuer), 'F' (Phase), 'A' (Discipline), 'L1' (Level), 'S1' (Sector), 'FP' (Type), 'Doc 1 001' (Title), '24-09-2016' (Distributed), 'PRO-1' (1st distrib.), 'REVIEW' (Status), and 'AR' (Delay). A 'Download' button is at the bottom right.

Following the evolution of a document

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Document version and feedback follow-up

The screenshot displays a web application interface for document management. On the left is a dark sidebar with navigation options: Documents, Distribution, Feedback, and Project settings. The main content area shows details for a document titled '<PHASE>-A-L1-S1-FP Doc 1'. It includes fields for Issuer (PRO - Company), Number (0001), and Expected distribution. Below this is a 'Versions' table with one entry: Label 001, Title Doc 1, Phase F - Future work, Distribution PRO-1, Sent 24-09-2016 07:24, Status REVIEW, Ori (document icon), and Alt Creation. A 'Feedbacks' table follows, showing one entry: Label 001, Title Doc 1, Approver Group: Participant 1, Verdict Approved with remarks, Feedback PRO-1, Sent 24-09-2016 07:34, Handler User Company, and Follow-up. A 'Feedback follow-up' link is visible at the bottom of the feedback section.

Home / Project

<PHASE>-A-L1-S1-FP Doc 1

« Back Document list Cancel document

Issuer PRO - Company

Number 0001

Expected distribution

Versions

Label	Title	Phase	Distribution	Sent	Status	Ori	Alt	Revision description
001	Doc 1	F - Future work	PRO-1	24-09-2016 07:24	REVIEW			Creation

Feedbacks

Label	Title	Approver	Verdict	Feedback	Sent	Handler	
001	Doc 1	Group: Participant 1	Approved with remarks	PRO-1	24-09-2016 07:34	User Company	Follow-up

Feedback follow-up

Information and communication extras



- Project's internal messaging service.

Messages New message

Inbox Sent Archived

No messages



Send a new message

Recipients

Available:

- PRO - Company
- User Company

Selected:

Subject

Body

Attachment

Choisissez un fichier | Aucun fichier choisi

Cancel Send



- Interactive notifications.

Notifications Mark all as seen

Date/Time	Message	
today at 07:34	New feedback is available. Feedback follow-up	✓
today at 07:25	You have received new feedback requests. View pending requests	✓
today at 07:24	New distribution by PRO - Company: PRO-1	✓

View all Close



- Dynamic help adapted to each process.



Print

- Get PDF (portrait)
- Get PDF (landscape)

- Printing of the current page or of saved selections.