



# Always up to date documents

Be-Sync Information Portal (BIP)



**BESYNC**

## Document management customised for the construction industry

How much information and documents do you collect for your projects and service locations?

Document management can be quite a challenge. For instance, where do you keep your up-to-date documents of an ongoing project? How do you share documents from 4PS Construct with your partners without given them access to your ERP-package?

The Be-Sync Information Portal (BIP) helps you to bring together all documents about projects, service locations and others in one central SharePoint Online document website. This environment is accessible to internal and external stakeholders, contains documents from different systems *and* at the same time it is fully integrated with your ERP 4PS Construct.

Our Be-Sync Information Portal provides you with one reality in a safe and easy-to-use document management system. Collaborating safely has never been easier!

# Be-Sync Information Portal (BIP)

## The 4 benefits of BIP

BIP links documents about project or service locations to a project or service location in 4PS Construct. All documents will become available in the SharePoint Online document website and in your ERP package 4PS Construct.

### 1. Share and collaborate digitally

Save and share documents, emails and files in BIP. No more mailing back and forth will save time and lower the chances of errors.

### 2. Flexible and simple setup

BIP is based on previously defined templates. It only takes a few mouse clicks to setup a brand-new SharePoint Online document website.

### 3. Give chain partners access to relevant documentation

Give chain partners access to all relevant documents via BIP, including documents from 4PS Construct. You determine who can see and/or edit what.

### 4. Provide one truth

Bring all documents together in one environment and provide one reality. Get real-time information, stop referring to outdated documents.

## What is a DMS?

BIP is a Document Management System (DMS) that is integrated with 4PS Construct. But what is a DMS?

A DMS helps companies with a better setup of their documents and document flows. The software makes sure that everybody can get access to the right, latest and approved information, always and any where.

By linking descriptive fields about your data (metadata) to documents in the DMS a simple search suffices to quickly find documentation. Even when you are searching on content rather than title!

# Be-Sync Information Portal (BIP)

## For whom did we develop BIP?

### Service and Maintenance

Is your organisation active in service and maintenance? Then you will be working with subcontractors, suppliers or housing associations, and have lots of documents to show for it. Use BIP to bring all documents together in a service location SharePoint Online environment.

#### Share documents with (chain) partners

Share installation manuals of boilers or checklists with your mechanics on site. Or have subcontractors add their own evidence surrounding issues to the documents site. Thanks to the integration of BIP with 4PS Construct, you can also see these documents in the ERP package, where you can schedule a follow-up.

#### Share documents with colleagues

For colleagues who start work on a service location, it is important that they are familiar with all the ins and outs of this location. Lots of information can be found in 4PS Construct, but at the same time you receive and save files outside of your ERP package, for example a mail with a new version of a floor plan. With BIP you can collect it all in one central environment and anyone with the appropriate rights has access.



# Be-Sync Information Portal (BIP)

## Projects

Large projects are usually complex projects. They have tight deadlines, you need to collaborate with partners and lots of documents are exchanged. Therefore, it is wise to have one central location where all information is gathered.

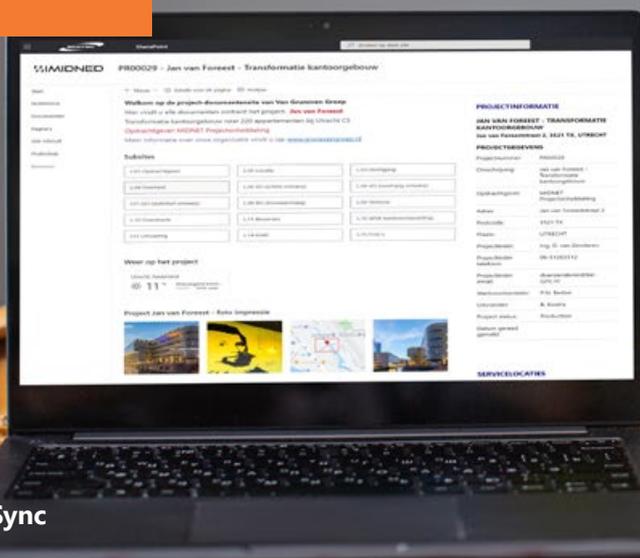
### Share documents with (chain) partners

Customised electrical diagrams or the latest construction drawings; you want to be certain that everybody uses the latest version of these documents. This avoids failure costs due to poor communication and having outdated information to work with.

### Share documents with colleagues faster

Projects are not only complex, but they also often have long lead times. Multiple colleagues collaborate during different project phases. Having one document website per project means that they can all find the right documents quickly, also if they join the project at a later date.

> **Example:** Project environment based on a template



# Be-Sync Information Portal (BIP)

## How does the BIP work?

BIP enables a two-way integration between 4PS Construct and Microsoft SharePoint Online. It is an admin portal, in which you not only arrange integration but also management and security settings in project templates for the various SharePoint document websites.

A new project or service location from 4PS Construct can be linked to a template in BIP. This is why you only need a few clicks to set up a document website in which all documents, including those from 4PS Construct, become visible for all colleagues and chain partners.

You can synchronise general product information, documents and responsibilities from 4PS Construct and SharePoint Online. The flexible configuration of the templates means that you stay in control of your SharePoint Online environment and it limits management to a minimum. Information will be put in the required structure and can be found quickly with your laptop, smartphone or tablet.

## Be-Sync Informatie Portaal (BIP)



# Be-Sync Information Portal (BIP)

## Functionalities

### > SharePoint functionalities

Profit from all default SharePoint Online functionalities like:

- ✓ Online collaboration and version management;
- ✓ Extended security settings;
- ✓ Flexible access from each location and any device;
- ✓ Extensive possibilities to personalise;
- ✓ Find documents quickly by recording metadata in templates.

### > BIP functionalities

BIP is ideal as DMS for your organisation thanks to these unique features:

- ✓ Real-time link between 4PS Construct and SharePoint Online;
- ✓ Simplified access; you do not need a SharePoint Online expert to set it up;
- ✓ Security and access rights arranged centrally in templates with the BIP;
- ✓ Predefined templates: it takes just three mouse clicks to set up a new site.

## Focus on Microsoft SharePoint Online

BIP uses Microsoft SharePoint Online as its DMS, fully integrated with 4PS Construct. SharePoint Online is part of the Microsoft 365 platform, previously known as Office 365. It is included in practically all Microsoft 365 licences and does not require an additional investment. You can start immediately, using the proven Microsoft technology. Be sure that you always profit from the latest SharePoint Online developments.

SharePoint Online is the Microsoft application for document management and online collaboration with colleagues and chain partners. Thanks to the integration with Microsoft 365 and the ERP system Microsoft Dynamics 365 Business Central, organisations are able to manage their documents centrally and with ease.

SharePoint Online is easy to use, accessible and affordable. It is the ideal platform for safe and efficient document management in the construction industry.

# Be-Sync Information Portal (BIP)

## The BIP management function

Employees with certain authorisations in BIP create and manage all things in relation to SharePoint document websites. This practical environment consists of the following:

### Set up basic configuration

Record all subsites (main folders), libraries (subfolders), authorisations, metadata fields, personalisations and views.

### Manage templates

Record the project and/or service location structure in the templates and link the 4PS Construct document types to the SharePoint Online libraries.

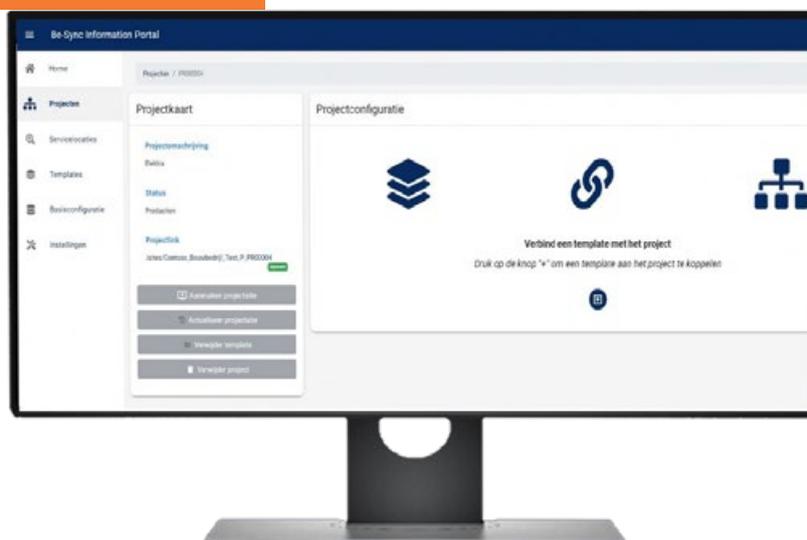
### Security and access rights

Determine in BIP what colleagues and partners gain access to what document libraries, and the relevant read and edit rights. Users will only see those parts they have access to.

### Link projects and service locations

Link a project or service location from 4PS Construct to a template and activate a SharePoint Online document website.

> **Example:** Link a project to a template



# Be-Sync Information Portal (BIP)

## BIP-SearchApp

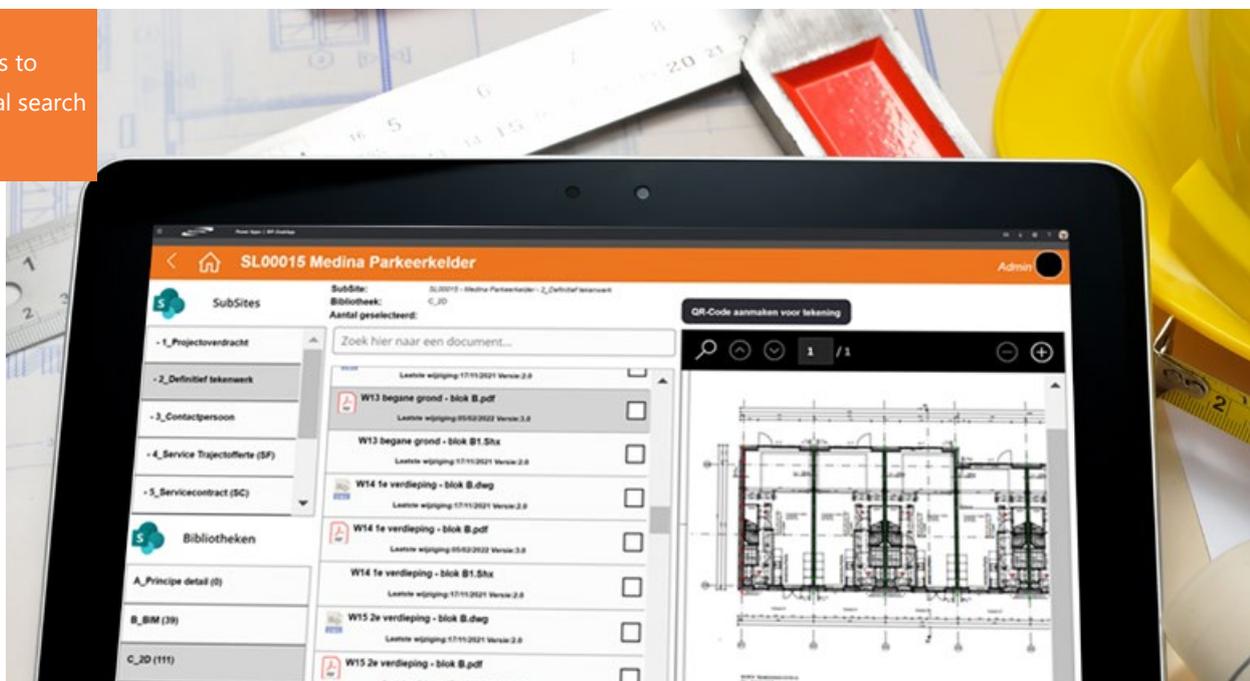
Do you have access through BIP to document websites of multiple projects or service locations? Are you searching documents or information across all document websites? Then you will benefit from our BIP-Search App! It makes sure that you will quickly find all the required documents using one central search location.

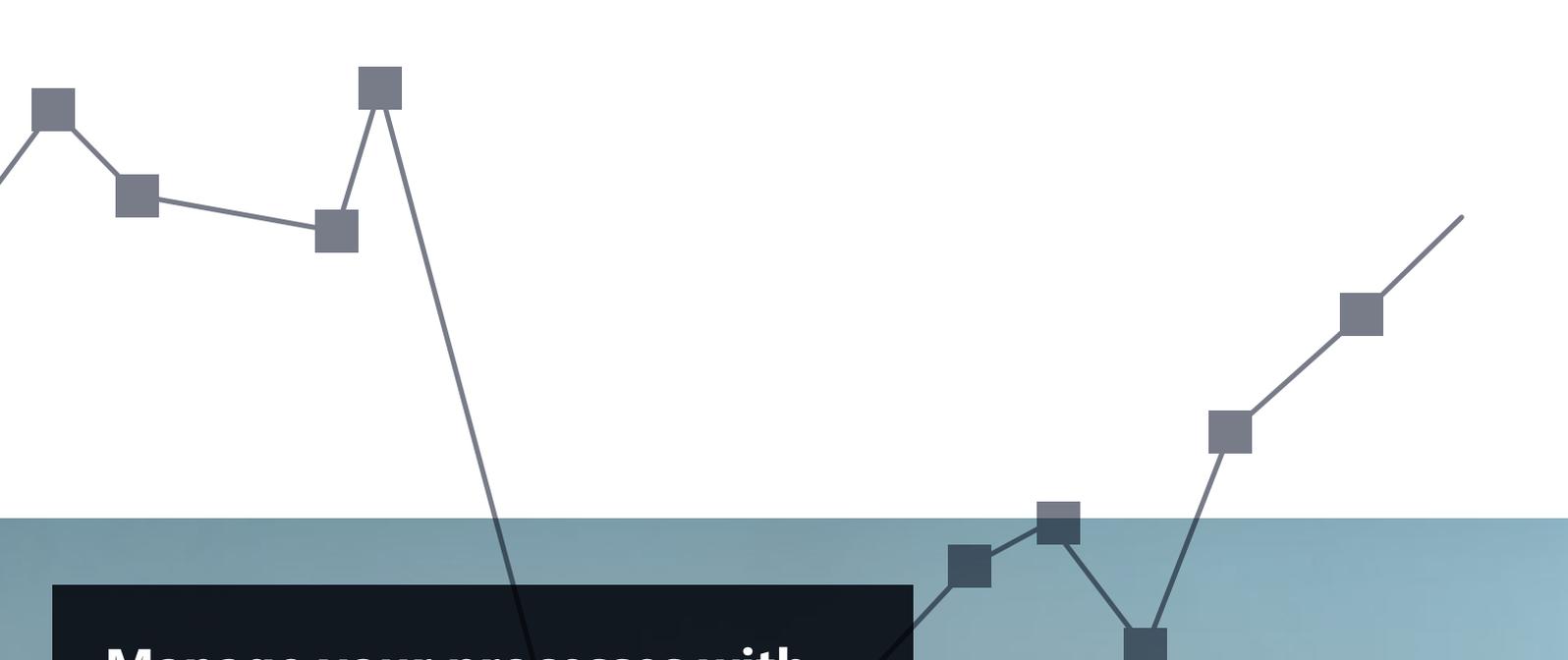
We used Microsoft Power Apps and Power Automate, parts of the Microsoft Power Platform, to develop the BIP-Search App. This is why the application can easily be rolled out in your organisation.

### > Some BIP-Search App functionalities explained:

- ✓ Search for file name or document type in all project and service locations;
- ✓ Preview function;
- ✓ Quick access to recently viewed service locations or projects;
- ✓ Extended filter and search possibilities for specific project and service locations;
- ✓ Search for indexed content of documents and files;
- ✓ Possibility to search in different business units;
- ✓ Forward documents using email as appendix or document link;
- ✓ Revision check using QR Code: scan the QR Code on the drawing and see if it is the latest version.

> **BIP-SearchApp:** Fast access to documents from one central search application.





## Manage your processes with software from Be-Sync and 4PS

Be-Sync is *the* Microsoft 365 and Microsoft Power Platform specialist for construction and service-oriented companies. We help organisations with all types of questions regarding online collaboration and information and document management, integrated in the 4PS Construct ERP or not.

Our solutions are always up to date; innovative and of high quality. Be-Sync = Be Synchronised.

Do you have any questions, or would you like more information about the Be-Sync Information Portal? Our Account Managers will be glad to tell you all.



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