PHAZE NAVIGATION
Quick Reference Guide

GENERAL NAVIGATION

QUICK REFERENCE

- This Quick Reference Guide will explain the navigation of the program.
- The home screen navigation uses sliding menus which can be opened by using the 'hamburger' style menu icons ☰ on either side.
- The Home button 🏠 will always be accessible and will bring you back the home page.
- Next to the Home button, is the **Current Project.** Click the button to select the project that you seek to work in. Your projects are assigned by your account administrator.
- the **Right Menu** displays user specific functions and access to the Assets & Materials module. (See Right Menu below)
- The **Left Menu** will consist of more activity and process oriented items. (See Left Menu below)
- Users may have different layouts depending on:
  - Their Role (Access Level)
  - Their custom configuration options
  - Their Account settings and Project data
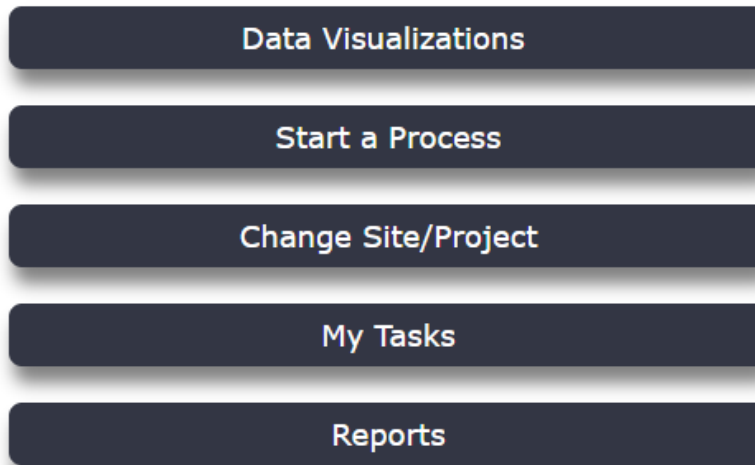
HOME SCREEN BUTTONS & ACTIONS

- **DATA VISUALIZATIONS –** *This is where you can access business intelligence to make informed decisions about your projects.*
- **START A PROCESS –** *Quickly start a process in the project that you are logged in to. The available options are controlled by your project role.*
- **CHANGE SITE/PROJECT –** *Similar to the top bar option, it will present a list of projects you are involved in and allow you to switch projects.*
- **MY TASKS –** *This will show you processes where you have Ball in Court*
- **REPORTS -** *This presents an interface where you can run reports*

USER INTERFACE

PHAZE is designed to run in any Web browser and functions for users who may be using mobile or tablet devices. With that in mind, PHAZE does not require double clicks (or taps), and will only very rarely use right click (or long presses). PHAZE will note where to do so explicitly.

There are also times where you will be presented more data by hovering over an element or record, which may have a popup which provides more data.

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LEFT MENU

LEFT MENU ITEMS – PURPOSE AND EXPLAINATION

PROCESSES IN MY COURT – Displays a log of processes for which you have the Ball in Court responsibility to act on the workflow.

PROCESSES CC'd TO ME – Displays a log of processes for which you have been CC'd to participate in the collaboration.

MY SUBMISSIONS – Displays a log of processes that you have submitted.

NOTE: LOAD ANY "PROJECT ACTIONS" MODULE TO CREATE OR MANAGE AN ACTION

ISSUES – Issue log displays all Public Issues and Private Issues that the logged in user is privy to.

WORK ORDERS – Work Orders log which displays Work Orders that the logged in user is privy to.

RFIs – RFIs log displaying all RFIs on the project. RFIs are always public to the entire project team.

VENDOR ISSUES – (If enabled for the user) Vendor Issues log which displays Vendor Issues based on PHAZE access rules, i.e., you only see what you are privy to.

RECURRING TASKS – Recurring Tasks log which displays all scheduled tasks for the current project.

TRANSMITTALS – Displays the Transmittals Log for the current project

CALENDAR – Create meetings and review meetings already scheduled.

SCHEDULES – (If enabled for the user) GANTT Chart schedule management and/or review.

PUBLIC PROCESSES – Displays all processes in one log for the current project that are public.

DOCUMENT DISCOVERY – Search PHAZE for uploaded documents.

DRAFTS – Displays the current user's draft processes.

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USER PROFILE – Displays the current user's Profile, where they can view/edit their details and permissions

VIEW PROJECT TEAM – Displays the team members in the current project

ASSETS AND MATERIALS MODULE – (If enabled) Brings users to the Assets and Materials Module

GO OFFLINE – Enables users to create processes offline, to later load to the program.

LOGOUT – Logs the user out of PHAZE and presents the login screen.

THERE ARE ADDITIONAL ITEMS AVAILABLE FOR USERS THAT MAY BE TURNED ON BY THEIR ADMINISTRATOR INCLUDING:
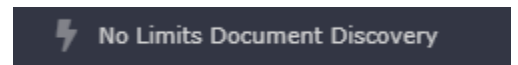
LEFT MENU

SCHEDULES – Allows users to access schedules in their current Project

RIGHT MENU

NO LIMITS DOCUMENT DISCOVERY – Gives users access to search ALL documents within the system

*Additionally, there are **Account Actions** (which must be turned on by the administrator), that are the same as the project actions described above, except they are for ALL Projects that a user is a participant on and are not limited to the user's current project.*