## Overview

The process of attaching documents in PHAZE is the same, regardless of where you perform the action in the system. Some areas in the system only allow attaching documents when you are the initiator of the process. Other areas, like comments, will always allow the attaching of files.

You will see areas to attach documents indicated with buttons, labeled

Add Attachments **OR** Add Documents

When these buttons are clicked, you will be prompted with a popup window for the attachments.

Multiple File Upload ✕

Select files...

Submit   Close
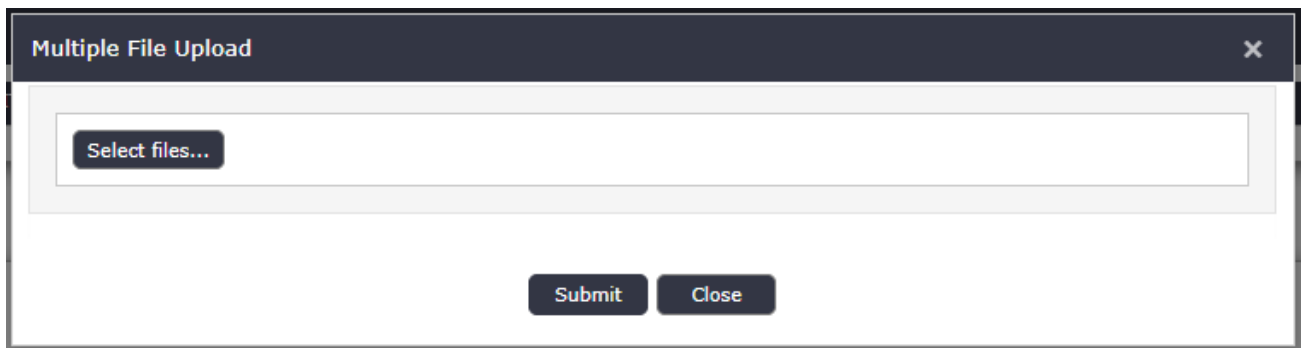
When you click **Select files…** you will open your system's file manager to attach one or multiple documents.

You will select the document(s) you wish to upload and you will see the progress bar indicate how much progress is made for each document being uploaded.
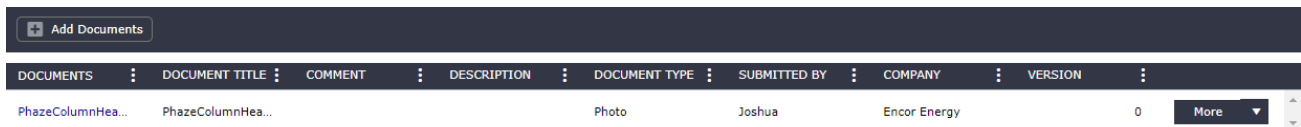
NOTE: You must wait for ALL documents to complete their upload before proceeding.

Once they all indicate that they are complete, you may proceed with the **Submit** button, and enter the document metadata, discussed below.

Document Metadata

All documents in PHAZE have certain metadata that is collected when a document is uploaded.

This is a sample of what document data is included when you upload a file.

Add Documents							
DOCUMENTS	DOCUMENT TITLE	COMMENT	DESCRIPTION	DOCUMENT TYPE	SUBMITTED BY	COMPANY	VERSION
PhazeColumnHea...	PhazeColumnHea...			Photo	Joshua	Encor Energy	0 More ▼

Documents – This is the actual file name and extension that you uploaded. You can click the blue text to open the file.

Document Title – This is an automatic and read-only field that takes the file's name (without the extension) and formats it as a string. This is used in other areas of the program for searches, filters, and ordering of document titles.

Comment – (Optional) This is an optional field where you can provide a comment about the document you uploaded.

Description – (Optional) This is a description about the document that was uploaded. This field differs from comment as it *should* be less objective and more descriptive than the comment field.

Document Type – (Recommended) This field is not required but is encouraged to be entered. Note: If you do not provide a value from the picklist, the field will be highlighted red across the system. This is to indicate to you (and your administrators) that no value was provided.

Submitted By - This field will automatically take the logged in user's name and populate this read-only field.

Company – This field will automatically take the logged in user's company name and populate read-only field.

Version – (Recommended) This field is to provide the document version if you make edits, changes, or amendments to a document and upload a new version. This field will be highlighted red to encourage users to provide a value.

Adding/Editing Metadata

When you initially create a process (such as on the create form of a process) or comment, you have the opportunity to make inline edits. You can make inline edits by clicking or tapping directly on the column's attribute that you intend to edit.

If you are adding or editing metadata from a process that is available to other users, i.e., collaboration is active, or simply want to edit the document metadata with a larger viewing window, you can click the **Edit** button that is found on the right side of the document record. The edit button may be combined with a remove button and labeled as **More** and present as a drop down menu.

Actions for Documents

When you are initially uploading a document, you have the option to either

Edit – This opens a second window where you can provide the details (opposed to doing inline edits). This may be present on all documents, but it only applies to documents **you** uploaded.

Remove – This is only available when initially uploading a document and is used to remove a document in the event that you uploaded a duplicate or mistakenly uploaded the wrong document.

NOTE: Once a document is submitted and a process is created you CANNOT remove it. You can only remove documents during the initial attachment process to the form or in the initial attachment process for the comment.