

Attaching Document/Comments

PHAZE® has a document management system for project collaboration and business records. Our document management is referred to as PHAZE Intelligent Document Security.

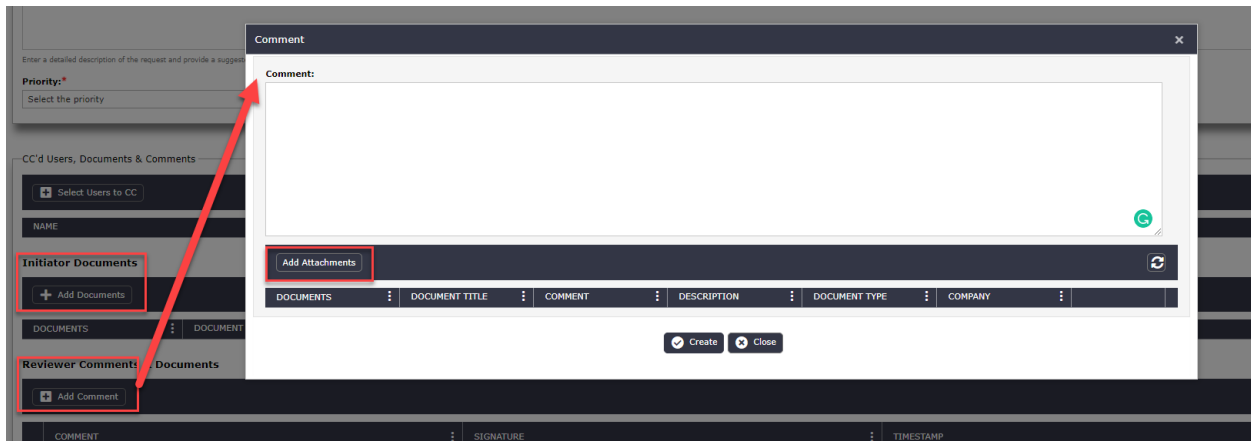
In PHAZE, document security is defined as documents are attached to a process that is routed. If a user can read a process, a user can open the documents and a user can search for the documents in the Document Discovery module. Each step actor of a process that has Ball in Court responsibility, and every carbon-copied user can attach, view, and/or edit a document. A document also can be found through the Document Discovery function in PHAZE. This document explains each procedure in the PHAZE document management system.

Initiator Documents vs. Reviewer Comments and Documents



Every process in PHAZE has a section where an initiator attaches a document. A document attached by an initiator can be only revised or edited by the initiator. Only when an instance is returned to be revised by the initiator, the initiator can edit the document. Otherwise, the document attached by the initiator is locked and cannot be revised by anyone.

On the other hand, a reviewer can attach a document when they have a comment. As shown below, an initiator can add documents directly by clicking the “Add documents” button while a reviewer clicks the “Add Comment” and then the “Add Attachments” button appeared in the Comment pop-up window. When a reviewer writes the comment, they can add attachments.

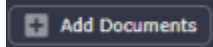


Commenting on a process is always available, so long as you have access to the process, and it is not closed or void. Comments can also have documents attached to them.

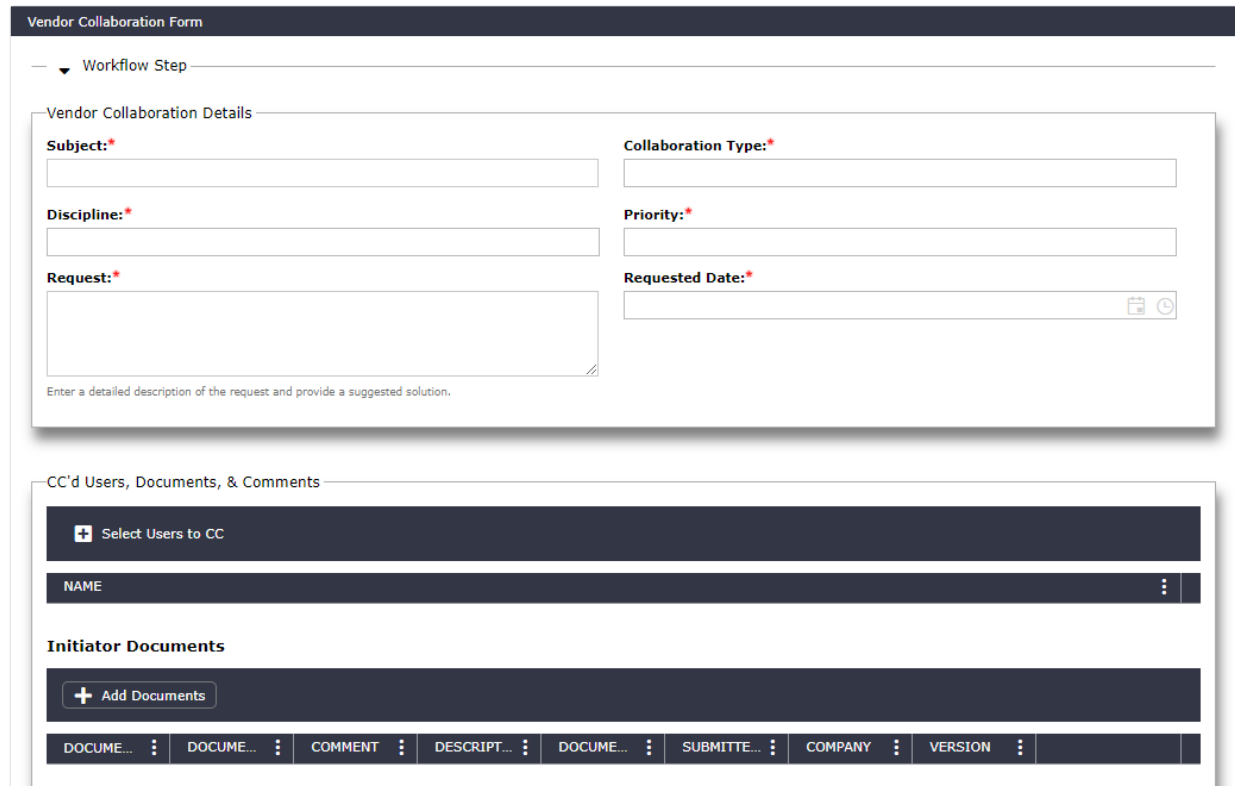
Attaching Document/Comments

How to attach documents to a process

The process of attaching documents/comments in PHAZE is the same, regardless of where you act on the system. Some areas in the system only allow attaching documents when you are the initiator of the process. For example, an initiator of the Collaboration process can add a document by clicking



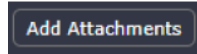
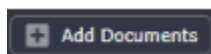
when they initiate a process.



The screenshot shows the 'Vendor Collaboration Form' interface. At the top, there is a 'Workflow Step' dropdown menu. Below it, the 'Vendor Collaboration Details' section contains several input fields: 'Subject:', 'Discipline:', 'Request:', 'Collaboration Type:', 'Priority:', and 'Requested Date:'. The 'Requested Date:' field includes a calendar icon. Below these fields is a text area with the instruction: 'Enter a detailed description of the request and provide a suggested solution.' Below the text area is a section titled 'CC'd Users, Documents, & Comments'. This section includes a '+ Select Users to CC' button, a table with a 'NAME' header, and an 'Initiator Documents' section with an '+ Add Documents' button. At the bottom, there is a table with columns: 'DOCUME...', 'COMMENT', 'DESCRIPT...', 'DOCUME...', 'SUBMITTE...', 'COMPANY', and 'VERSION'.

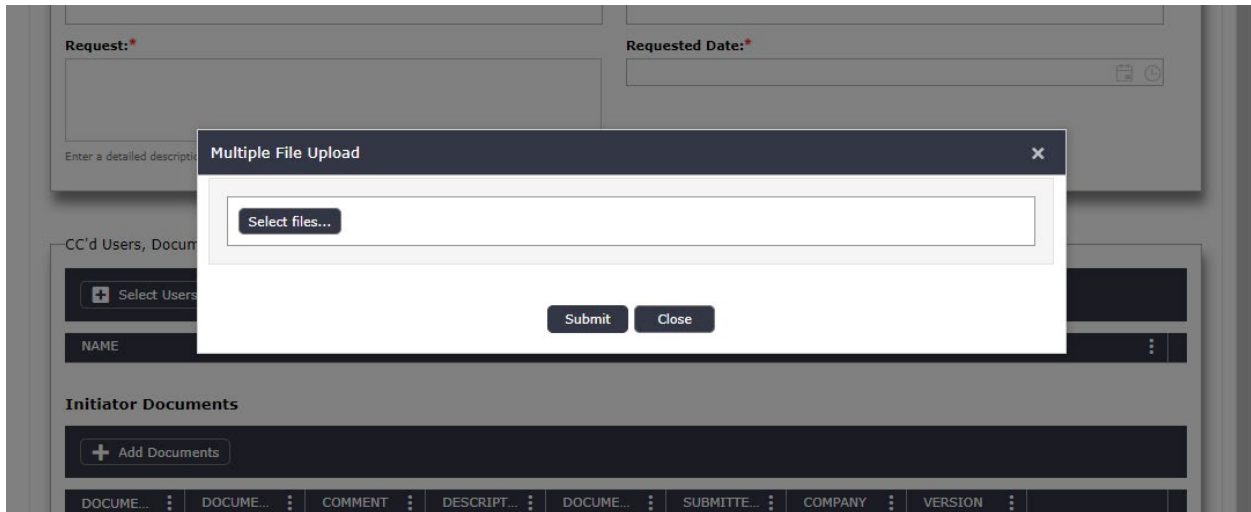
However, other areas, like comments, will always allow the attaching of files such as photos.

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



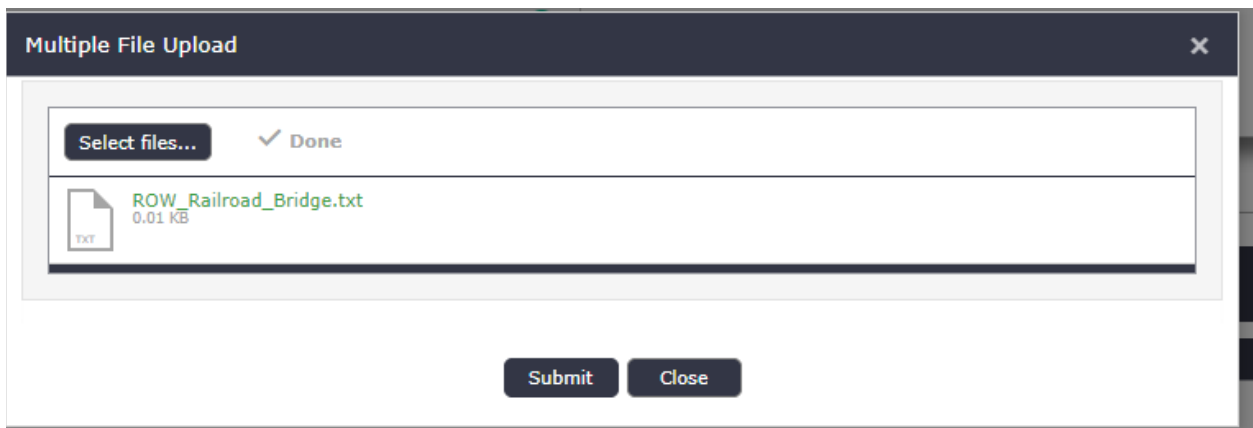
When these buttons are clicked, you will be prompted with a pop-up window for the attachments.

Attaching Document/Comments



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. See below.



Document Metadata

All documents in PHAZE have certain metadata that is collected when a document is uploaded. This metadata can be used as criteria when a user searches for a document in the Document Discovery.

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

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

Attaching Document/Comments

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 of 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.

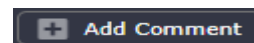
Company – This field will automatically take the logged-in user’s company name and populate the read-only field.

Version – This field is automatically populated when a user uploads a file. More detail will be explained in the PHAZE document Version Management section.

How to attach comment to a process

The process of attaching comments in PHAZE is the same, regardless of where you perform the action in the system. Commenting on a process is always available, so long as you have access to the process and it is not closed or void. Comments can also have documents attached to them, and attaching a document is the same as described in the ‘**Attaching Documents**’ instructions.

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



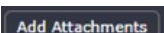
When these buttons are clicked, you will be prompted with a window for the comment.

Attaching Document/Comments



Depending on the context of what you are commenting about, you may sometimes be given a prompt that is instructing you about what the contents of the comment should be. For example, if a process is being returned to the initiator for revision, the user may be prompted to comment on why they are returning the request or what they expect to be revised.

Comments can be comprised of the text field and/or files and attachments.

Within a comment, you can select  to add files to your comment.

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

You can select the files 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. (See *Attaching Documents for more info on document metadata.*)

Comment Metadata

All comments in PHAZE have certain metadata that is collected when a comment is submitted.

Provided below is a sample of what comment data is included when you submit a comment.


Attaching Document/Comments

+ Add Comment				
COMMENT	SIGNATURE	TIMESTAMP		
I have reviewed your specifications and approve.	Encor Energy	08/24/2020 10:09 AM	No	▲ ▼

Comment – This is the contents of the text that you entered when you submitted the comment.

Signature– This field is automatically populated with the user’s name who submitted the comment.

Timestamp – This is the time the comment was submitted.

Paper Clip Icon  - This indicator will either be yes or no, indicating that the comment has attachments.

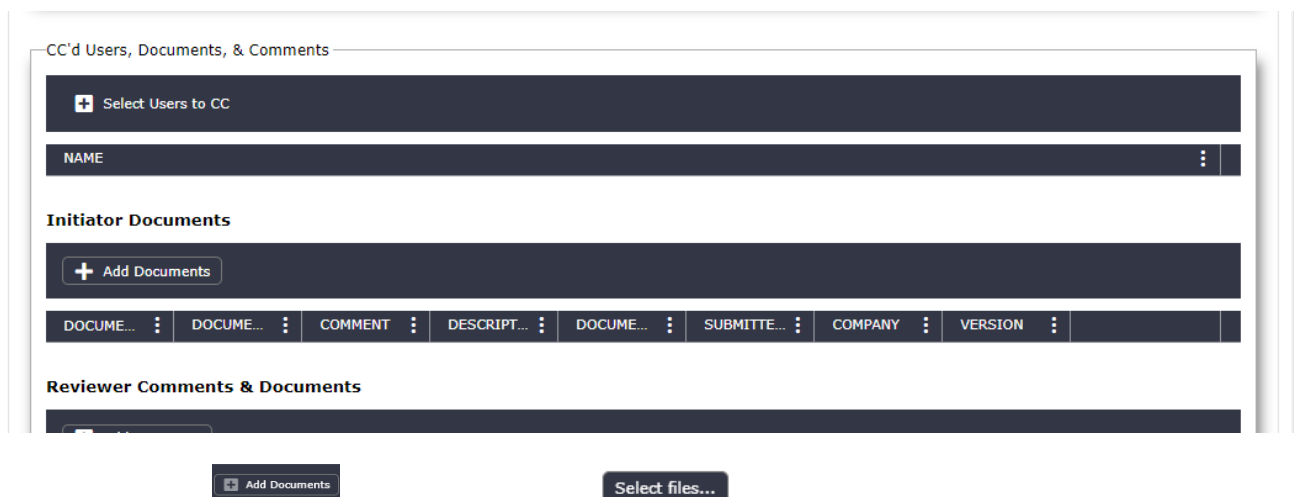
Actions for Comments

Comments can be clicked to open where you can view the comment in a dedicated window and view the attachments (if any).

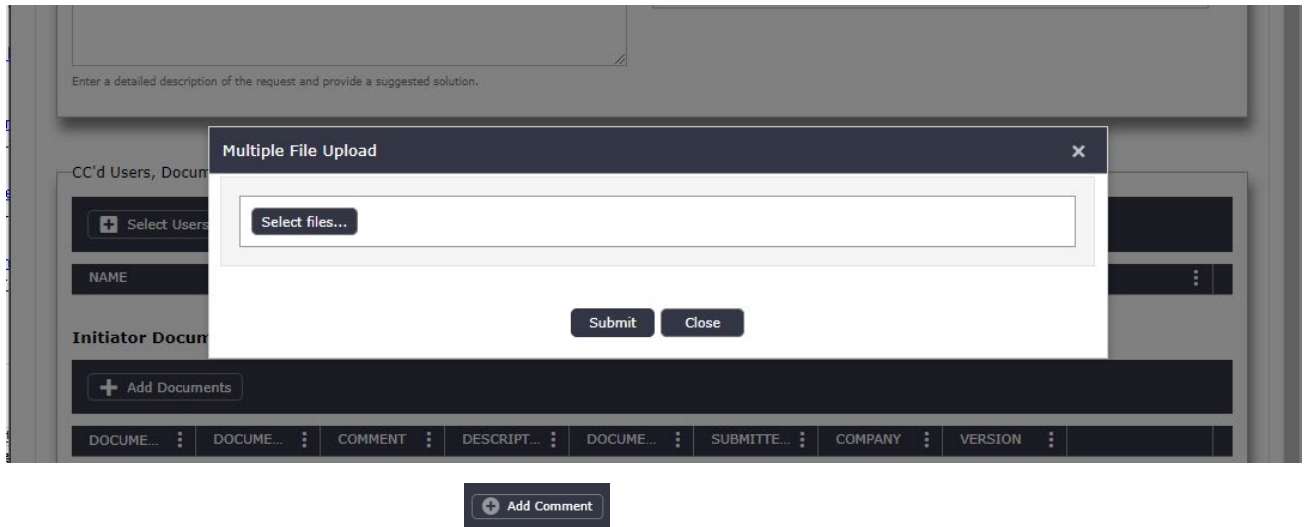
NOTE: Once a comment is submitted, you CANNOT remove it. Be sure you have the correct process, attachments, and comment contents before submitting.

Initiator Documents vs. Reviewer Comments and Documents

The initiator can add documents when they initiate a process such as Collaboration.

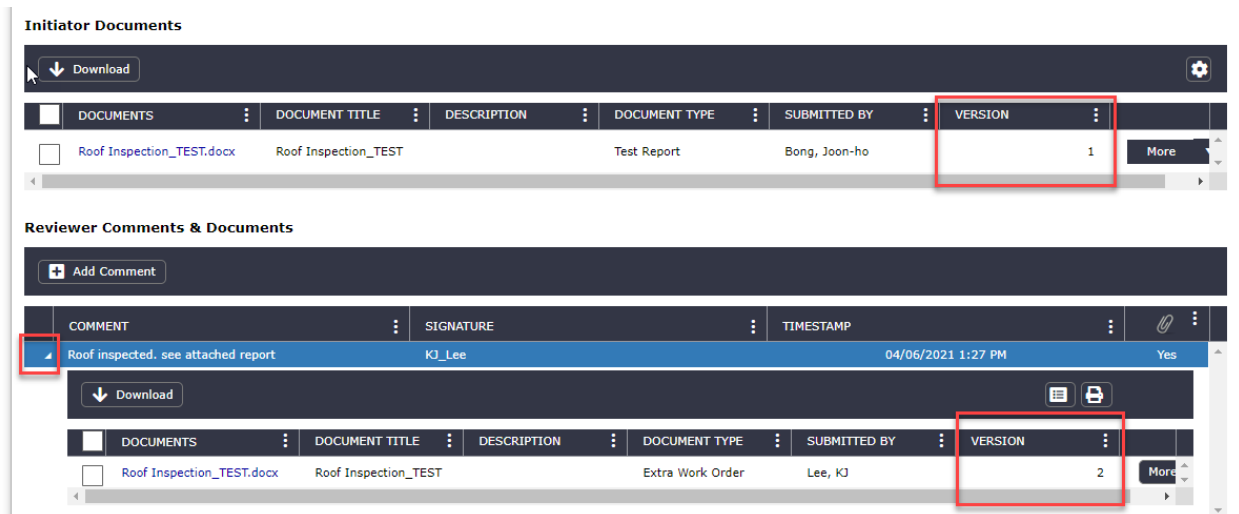


Attaching Document/Comments



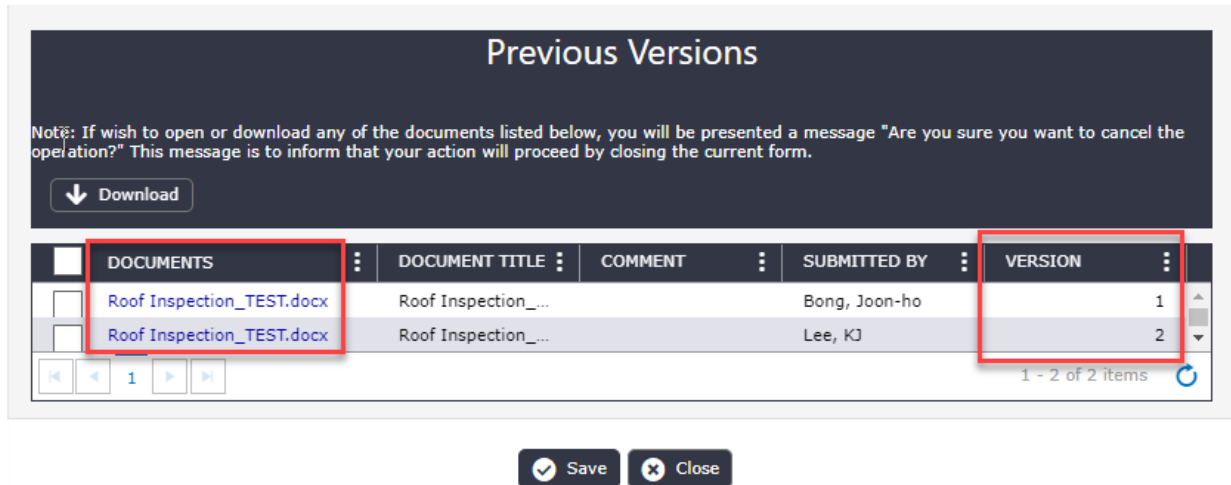
PHAZE document Version Management

PHAZE has an automatic document revision control. If you upload a file with the same name and extension, it will increase the version of the file. For example, an initiator of a work order attaches the file called the “Roof Inspection_TEST.docx” file as shown below. The reviewer of this work order reviewed the process instance, downloaded the attachment, revised it, and added a new comment attaching the file again without changing the file name. As shown in the red box, the file added by the reviewer shows version 2 while the file added by the initiator shows version 1.



If you want to see the previous version of the document, click the “More” button and click “Edit Attribute” or “View Attributes”. At the bottom of the pop-up window, you can see the previous version of the attached documents.

Attaching Document/Comments



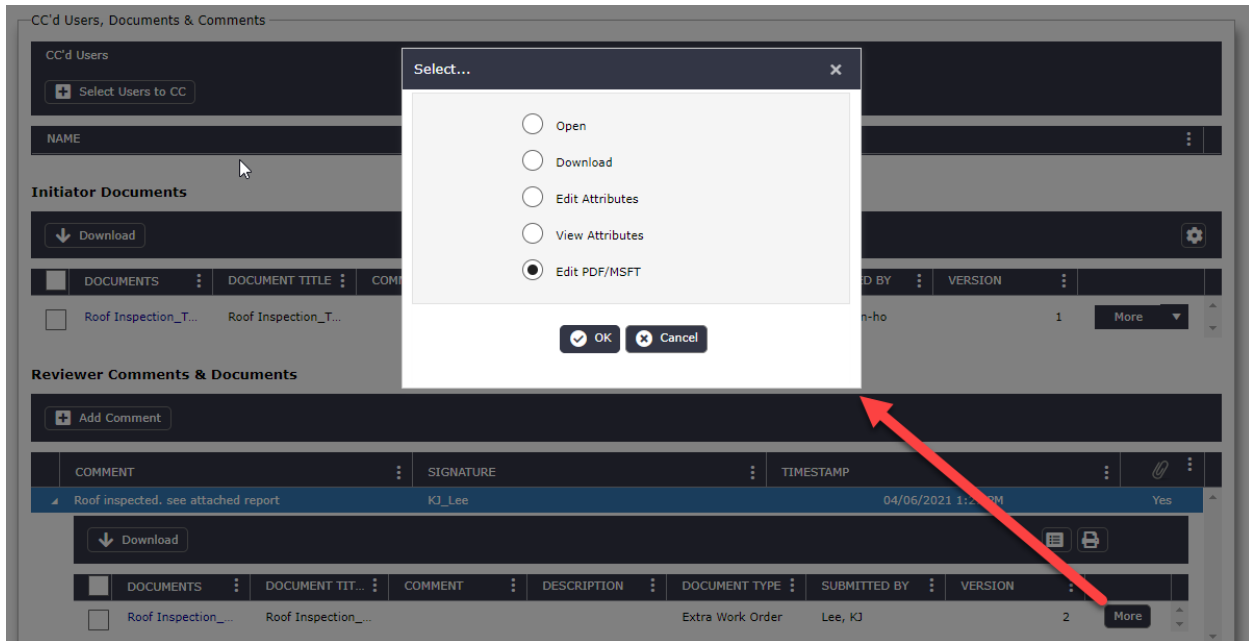
How to annotate documents


A reviewer can annotate the document. Click the "More" button then "Edit PDF/MSFT" option will be displayed. PHAZE has an online editor for PDF and Microsoft Word documentation. Note: The Edit MSFT option will not be available unless your organization's PHAZE subscription includes the Microsoft license.

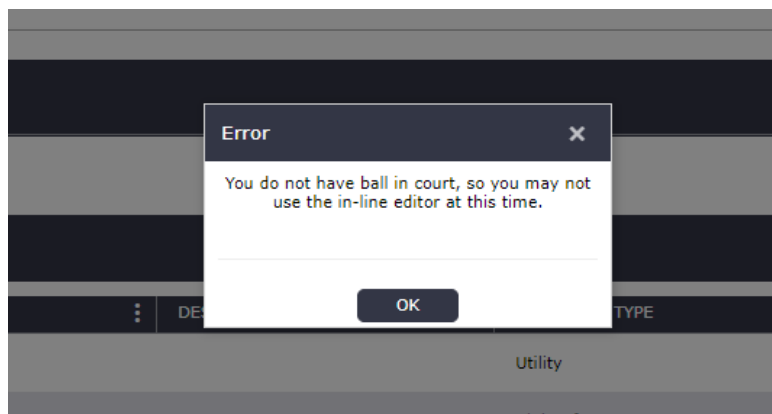
Note: There are 5 options when a reviewer clicks the "More" button; Open, Download, Edit Attribute, View Attributes, and Edit PDF/MSFT

- Open - A user opens the document on the page.
- Download – A user downloads the document on their computer.
- Edit Attributes – A user can edit the attributes of a document if you have Ball in court responsibility or it is your document that you uploaded before.
- View Attributes – A user can view the attributes of a document such as description, document type, submitted by, etc.
- Edit PDF/MSFT – A user can edit the attached PDF or Microsoft word/excel file. See below for more description.

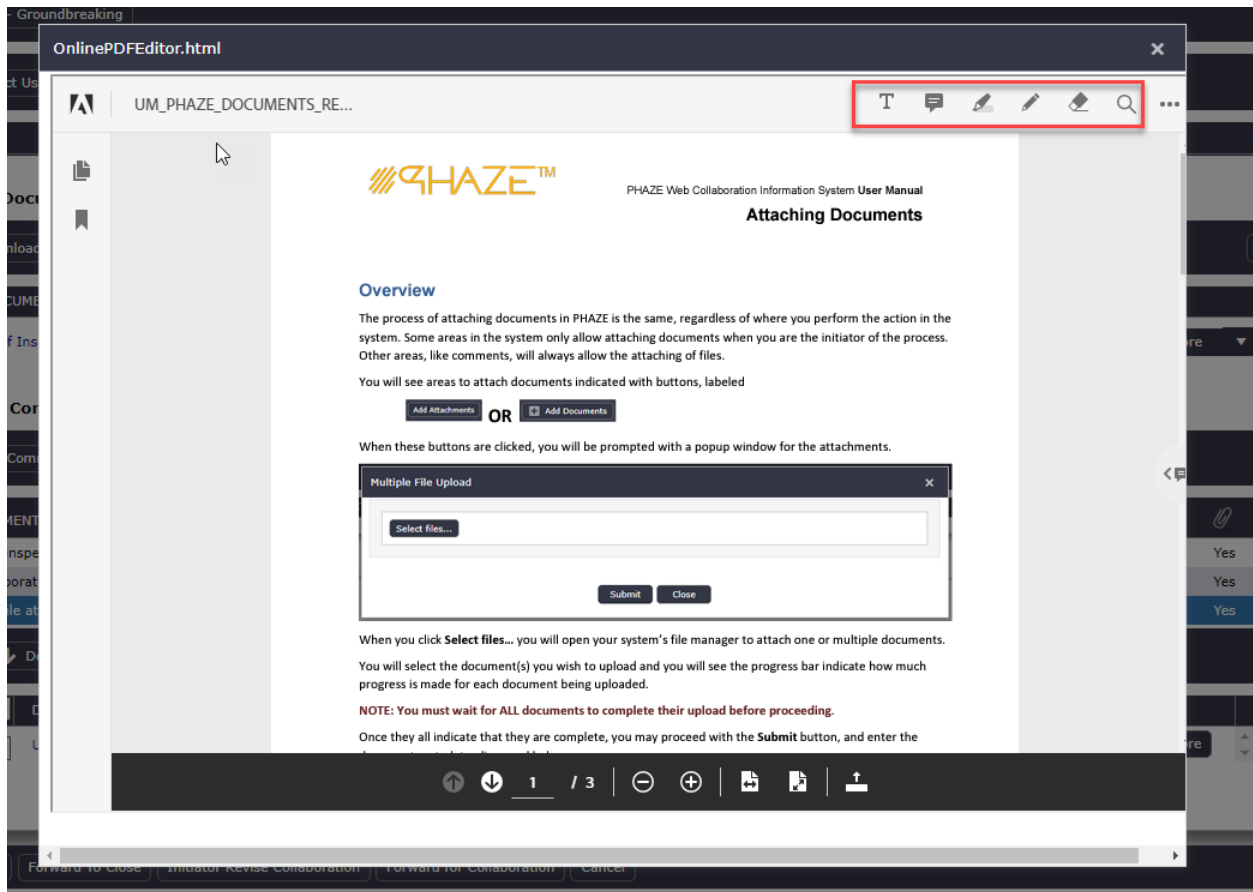
Attaching Document/Comments



If the attached file is an MS Word or Excel file, the Microsoft editor will open. With the MS editor open, the left corner  (hamburger button) gives you the functionality of the Microsoft program associated with the file. A user can edit/revise a document or leave a comment in the text (See Appendix). When done, click the “Save” button on the right upper corner. The document will save back to the PHAZE server. Only a user in the ball in court responsibility can edit the attached document to prevent multiple revisions at the same time as shown below.



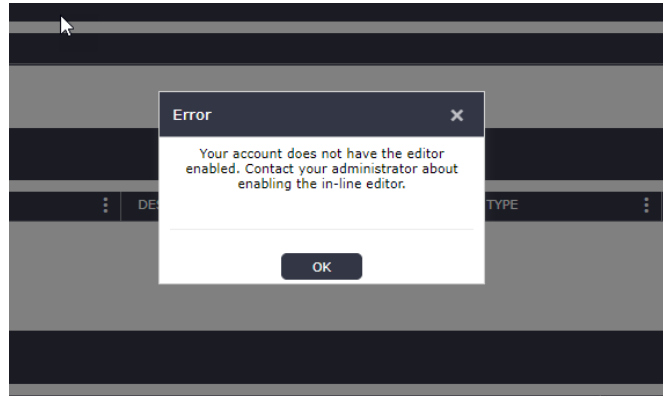
Attaching Document/Comments



If the attached file is PDF, the Adobe PDF annotator as shown above will open. A reviewer can add text comments, sticky notes, or highlight text to annotate by using the markup tool in the upper right corner. However, there is a difference between Adobe PDF annotator and MS word Editor in PHAZE when the annotated document is saved. When you click "Save" in PDF annotator, the file is downloaded automatically on your computer while a file in MS Word/Excel editor is saved automatically in PHAZE. Therefore, a reviewer must save the file to their computer and reattach the file after annotation.

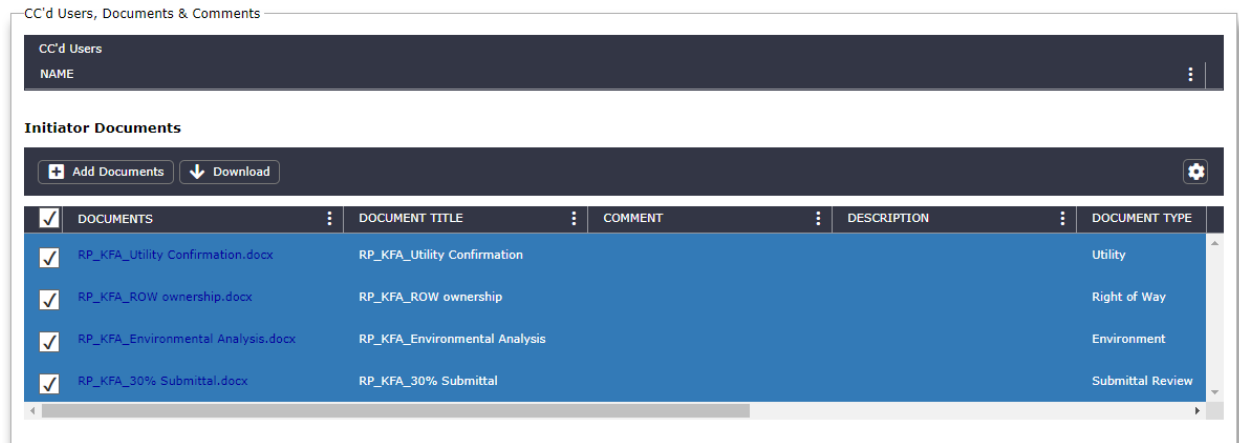
Note: If your account does not have the editor enabled, you will get the below message. Please contact an administrator to turn on this feature.

Attaching Document/Comments



Download Documents in Batch

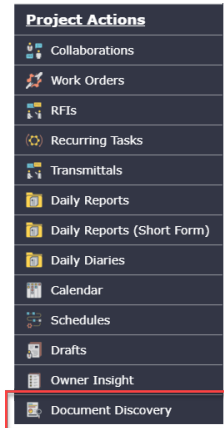
A user might download documents in Batch. A user can select the documents that they want to download one by one or just click “Documents” so it will select all attached documents as shown below. Next, click the “Download” button.



No Limits Document Discovery

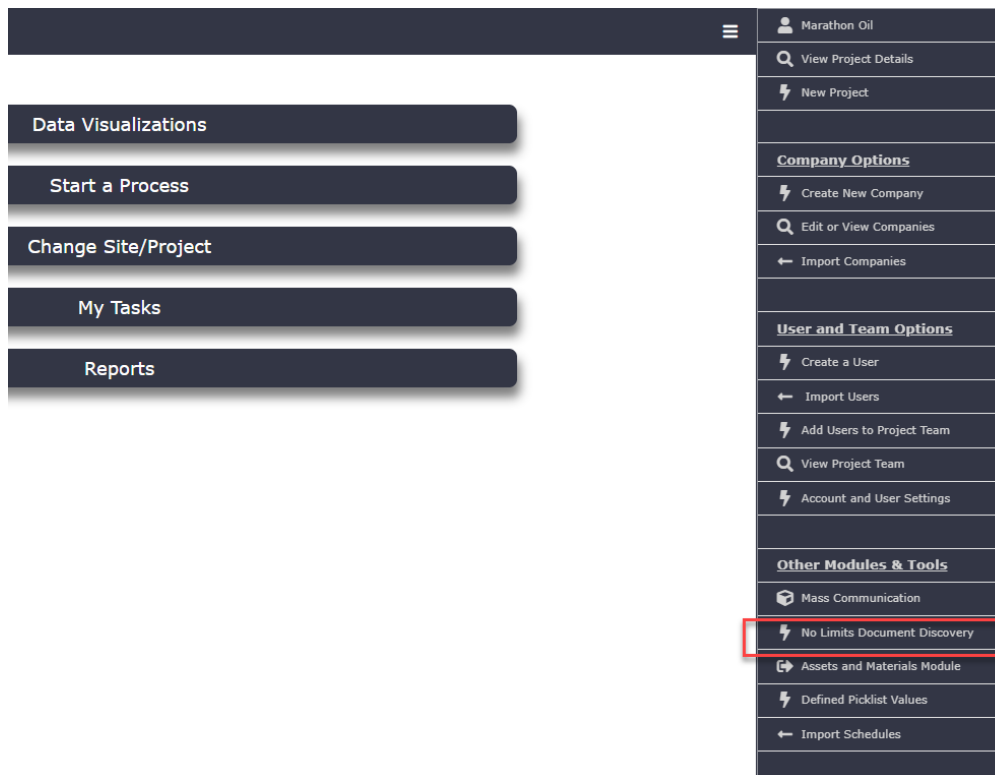
PHAZE Intelligent Document Security defines the permission of editing or viewing a document per their role. It also applies when a user searches for a document using Document Discovery as shown below.

Attaching Document/Comments



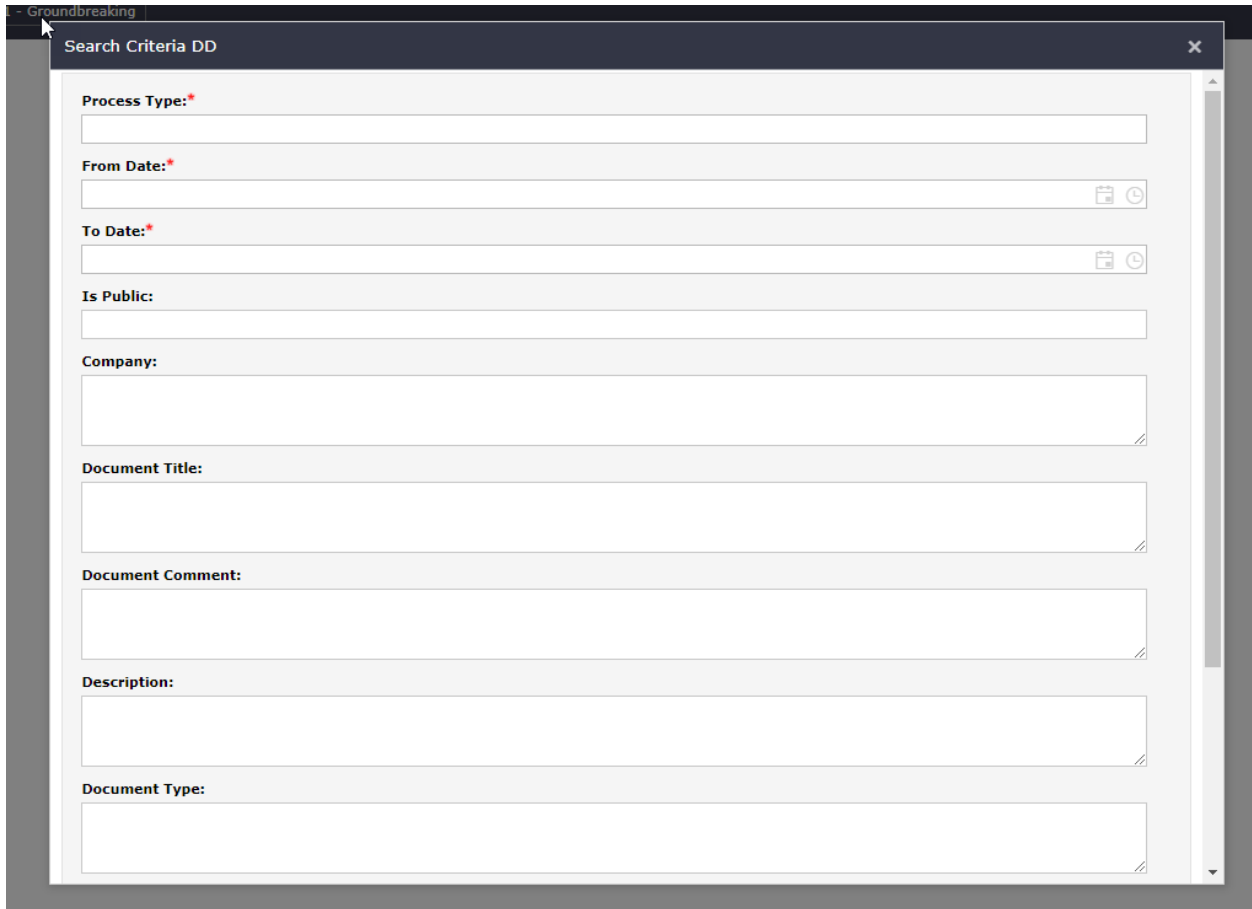
There are some cases that a user needs no limit document discovery regardless of their roles. Your Program/Project Manager, Document Control, or legal department needs to have no limits document to discovery for complete unrestricted document searching.

Your PHAZE administrator controls who has the no-limits privilege. When a user clicks the hamburger menu at the right top corner, they can find a menu at the bottom called “No Limits Document Discovery.”



Attaching Document/Comments

When a user searches for the document, they can set the criteria in document discovery such as Process type, From Date, To Date, etc. as shown below. The only document that met these criteria will be retrieved from a project.



The screenshot shows a web browser window with a tab titled "Groundbreaking". The main content is a form titled "Search Criteria DD" with a close button (X) in the top right corner. The form contains the following fields:

- Process Type:** A text input field with a red asterisk indicating it is required.
- From Date:** A date selection field with a red asterisk, including a calendar icon and a refresh icon.
- To Date:** A date selection field with a red asterisk, including a calendar icon and a refresh icon.
- Is Public:** A text input field.
- Company:** A text input field with a small diagonal icon in the bottom right corner.
- Document Title:** A text input field with a small diagonal icon in the bottom right corner.
- Document Comment:** A text input field with a small diagonal icon in the bottom right corner.
- Description:** A text input field with a small diagonal icon in the bottom right corner.
- Document Type:** A text input field with a small diagonal icon in the bottom right corner.