



Getting Started Guide

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Introduction

Welcome to PHAZE!

This document has been prepared to walk you through the steps required to get started using PHAZE. As the PHAZE Account Admin for your organization, the steps in this document must be performed sequentially. You may refer to this document in the future when setting up additional projects, companies for those projects and new user profile accounts for those projects.

Requesting a PHAZE Account

We recommend that you setup your account with a laptop or desktop computer. Proceed by navigating to the PHAZE account setup page: [Link for PHAZE Account Request](#)

Or copy and paste this link into your browser:

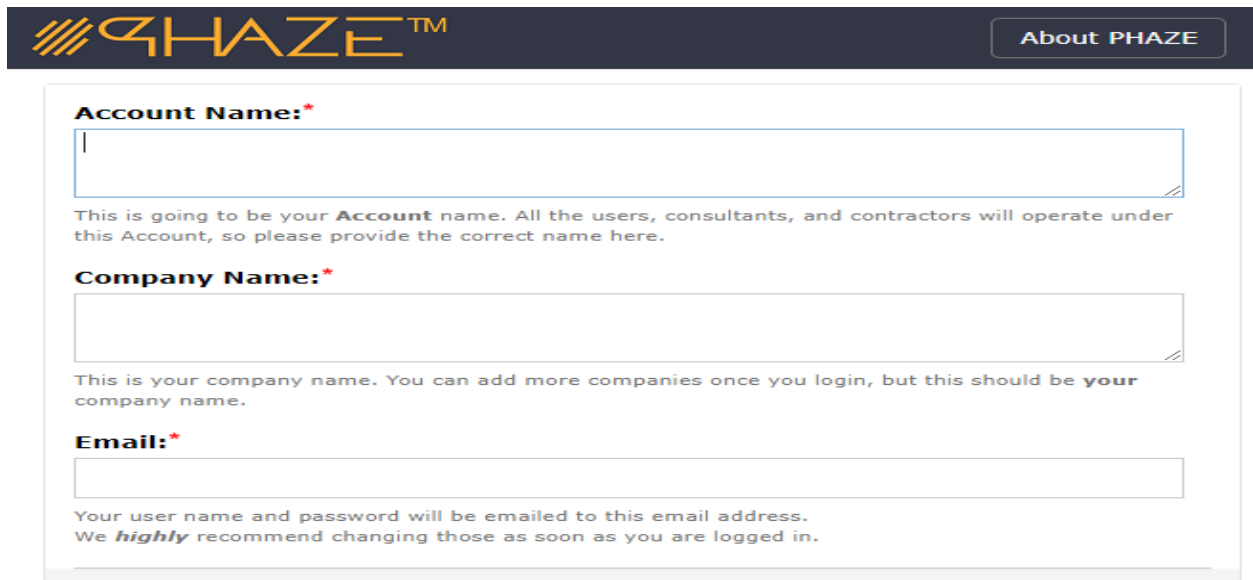
<https://5azepm.com/ob/logonGuest.aw?domain=PHAZE#/spa>

Creating an Account

Following the link provided, you will be presented with a screen that will capture some initial information to get you started.

You will configure PHAZE to best suit your project team's organizational structure once your account is created.

The first screen the link provided will show you is Figure 1, below



The screenshot shows the PHAZE account creation interface. At the top left is the PHAZE logo, and at the top right is a button labeled "About PHAZE". The form contains three input fields, each with a label and a red asterisk indicating it is required:

- Account Name:** A text input field. Below it, a note states: "This is going to be your **Account** name. All the users, consultants, and contractors will operate under this Account, so please provide the correct name here."
- Company Name:** A text input field. Below it, a note states: "This is your company name. You can add more companies once you login, but this should be **your** company name."
- Email:** A text input field. Below it, a note states: "Your user name and password will be emailed to this email address. We **highly** recommend changing those as soon as you are logged in."

You will be expected to provide your:

Account Name

- This is the Account name that all users and processes will operate under. Be mindful of what you provide here as Users, Projects, Companies, and Processes will all be managed in this Account. Every PHAZE customer has a unique Account and this is your very own instance of PHAZE. Once created, it cannot be changed or modified. *Hint: Account owners generally name their account using the name of their Capital Program, project Initiative, of Legal Company Name.*

Company Name

- This is where you provide your Company's name. This may or may not differ from your account name. You will have a chance to add more details as well as create other companies once you are logged in.

Email

- This is an email address that will be sent the initial log in information. Once you receive these credentials, you can log in and set your own username and password.

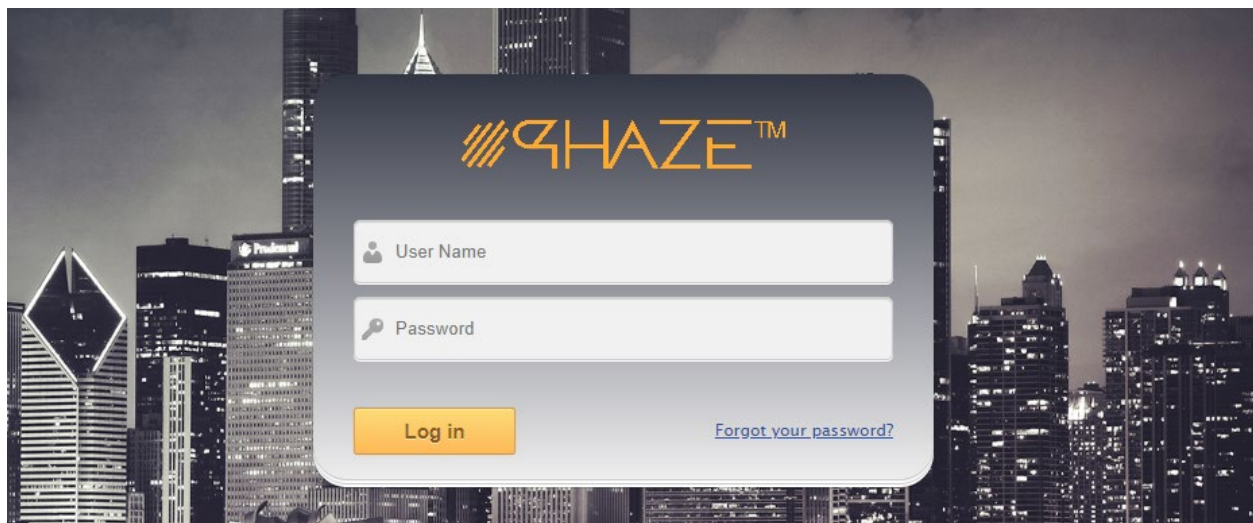
You will be presented a confirmation message once you have created your account.

Logging In for the First Time

Once you complete the initial form to get started, you will receive an email with a login name and a password. You can then go to [this URL](#) to load the login page.

Or copy and paste this link into your browser:

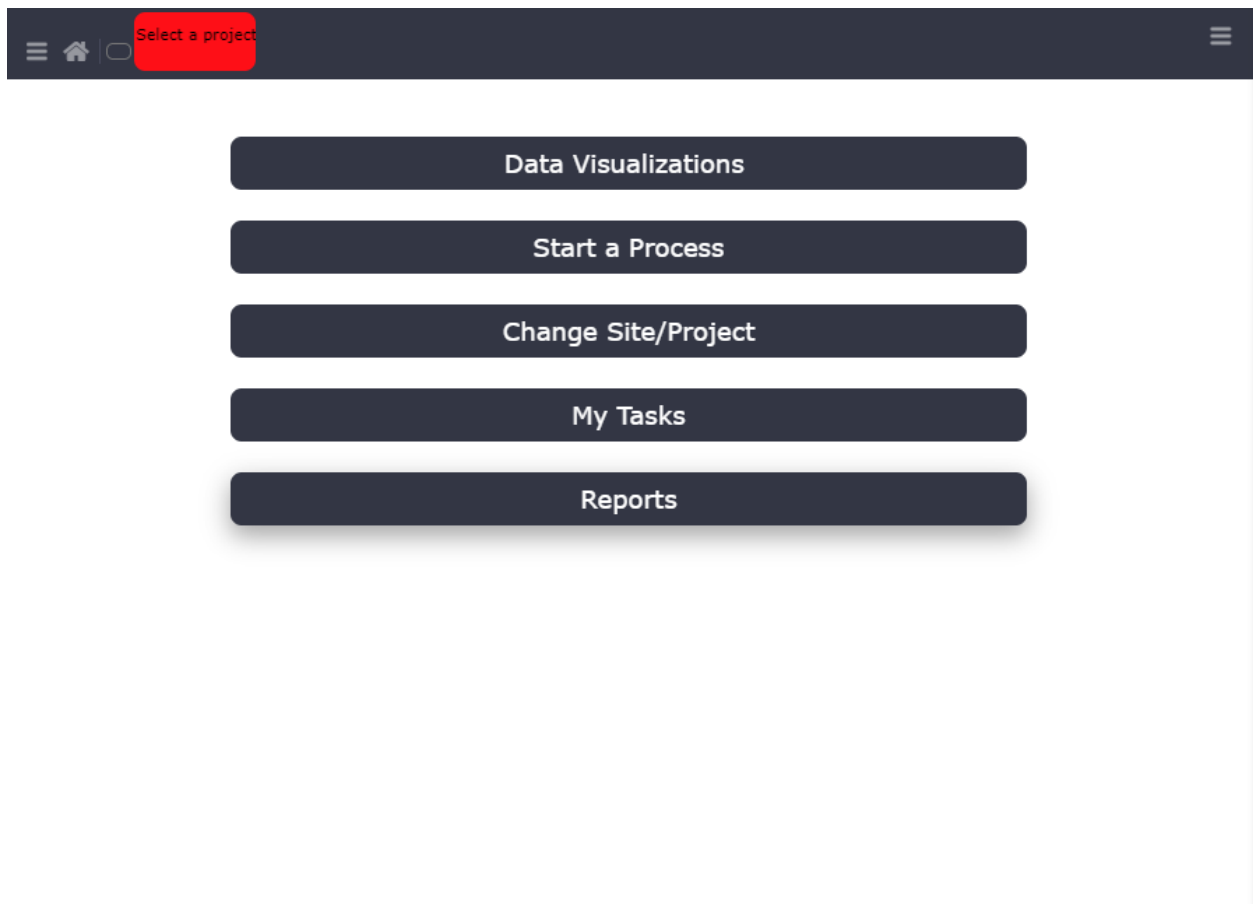
<https://5azepm.com/ob/logonOp.aw?domain=PHAZE&logonPage=logon2.html>



Using the User Name and Password that was sent to the email address that you provided, you may log in.

Upon successfully logging in, you will be presented with the home page.

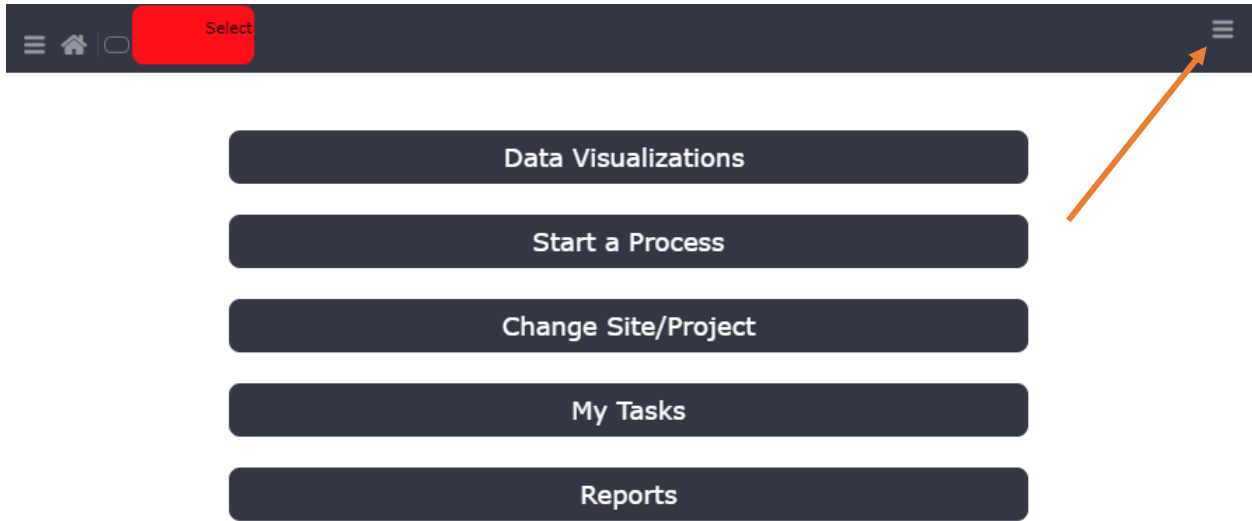
We will go into more detail about what all these functions are later, but for now let's get some companies, projects, and users added to our new Account!



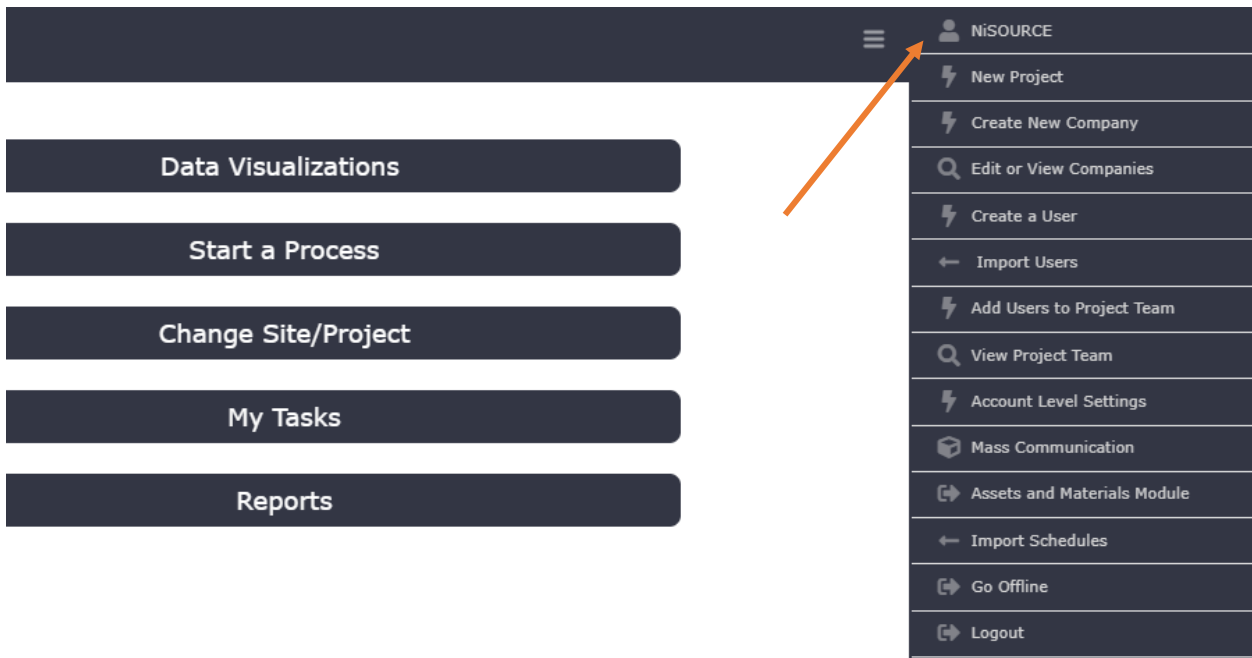
Configuring Your User Profile

The user you are logged in as acts as an administrator of your Account. This role has privileges that no other users do and this guide will discuss all the user roles in detail later on. For now, let's slide out the right menu and select your profile to add a few details.

Sliding Out the Right Menu



Selecting your profile (Top Menu Item)



Once you click your profile, you will have the chance to add/edit details about this user (you).

We will go over some of the fields and attributes you should change for now. There are additional options to configure here, but those will be discussed in more detail later.

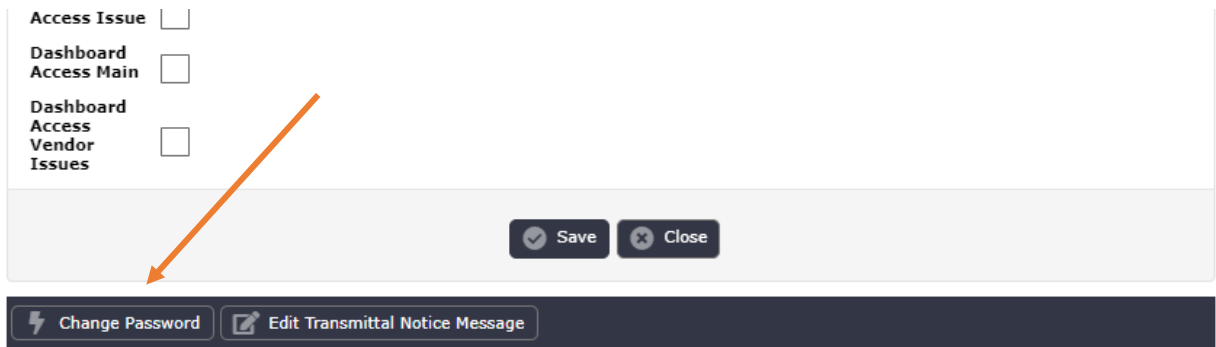
The screenshot shows a user profile configuration page. At the top, there is a dark navigation bar with a home icon, a profile icon, and a 'Select' button. The main content area contains several form fields:

- Name:** A text input field, highlighted with a red border.
- Login Name:*** A text input field containing 'NiSOURCE', highlighted with a red border.
- Email Address:** A text input field containing 'theguelahpapyrus@gmail.com'.
- Phone Number:** An empty text input field.
- Account Status:** A dropdown menu with 'Trial' selected.
- Time Zone:** A dropdown menu with 'Coordinated Universal Time (GMT+0)' selected.
- Company Phone Number:** An empty text input field.
- Company Name:** An empty text input field.
- Select Company:** A button with a plus icon and the text 'Select Company'.
- COMPANY NAME:** A dark header bar with a vertical ellipsis icon on the right.
- Welcome Email Contents:** A text area containing 'Welcome TEST TEST'.
- Two Factor Authentication ON:** A checkbox that is currently unchecked.
- No Limits DD:** A checkbox that is currently unchecked.
- Security Questions:** A dropdown menu with a downward arrow.
- Ticket Approver:** A checkbox that is currently unchecked.
- Ticket Creator:** A checkbox that is currently unchecked.
- Transparency Flag:** A checkbox that is currently unchecked.

It is recommended that you change your User Name and Password. By default, your login name is your Account's name.

You can add additional details as well at this point. Note: If you click '**Select Company**' the company you provided on creation of your account will already be present.

At the bottom of your profile, you will see a Button for changing your password.



The screenshot shows a user profile form with three checkboxes: 'Access Issue', 'Dashboard Access Main', and 'Dashboard Access Vendor'. Below these is a 'Save' button and a 'Close' button. At the bottom of the form, there is a dark bar with two buttons: 'Change Password' (with a lightning bolt icon) and 'Edit Transmittal Notice Message' (with a pencil icon). An orange arrow points to the 'Change Password' button.

This button will provide a window which will ask you to provide a new password and to confirm your new password. Be sure to setup your secret questions as well.

Creating a Project

Creating a Project is the next step to getting started. This is where all your information will reside, in the context of a **Project**. Some users may have one project, some users will have many, but it is entirely up to you on how Projects are assigned, managed, and configured.

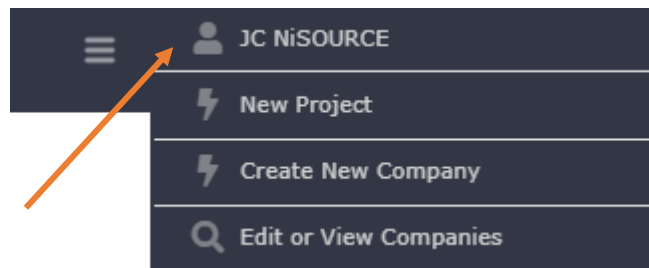
Let's create a new Project.

Slide in the **right menu**.

Select the second option down, **New Project**.

You will be presented a form to fill out that contains the Project Information.

Once you fill out the project information, you will be presented with a list of eligible users to be a part of the **Project Team**. At this point in time, you will only see your own name here.



Add yourself to the project by checking the box to the left of your name and selecting **Continue** in the **Action Bar**. (Don't worry, if you don't add yourself now, you can do this later.)

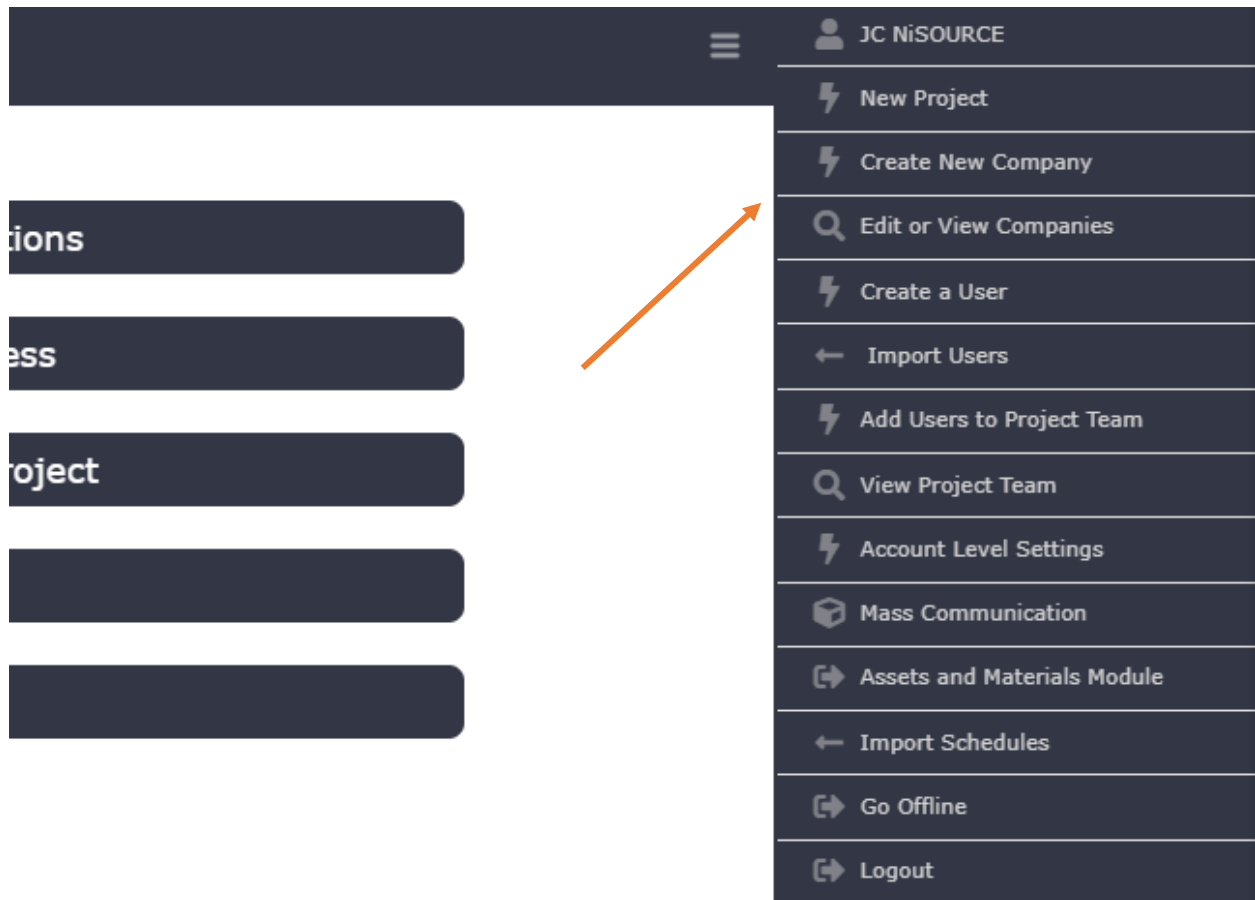
You will then go to the main page, and either: Click **Change Site/Project** on the home page, or click the Project Name in the top bar to see a list of available projects to have as your **Current Project**.

All actions that you take are project specific. The logs, reports, dashboards, users, companies, calendar, schedule, Assets and Materials Module, all are specific to the Current Project you have selected. More details on Projects and context will be discussed later.

Creating New/Additional Companies

You will have a single company already available from when you created your account.

You can add additional companies or organizations using the **right menu**.



You can create or edit companies using the pair of Buttons that are in the right menu.

Let's create an additional company. Click on **Create New Company**

You will be presented a form to fill out for this company's information. When you are done filling this out, be sure to select **Continue** at the bottom left of the form in the **Action Bar**.

Creating New Users

When creating new users, you have the option to import via a .csv file with the provided template, or create users on-the-fly one by one.

Users via Import Template

Once you have acquired the Import template spreadsheet from the PHAZE website. You can also refer to the **Importing (Users) User Guide** for more details on this.

Step 1. Fill out the information for each user.

	A	B	C	D	E	F	G	H	I
1	RegularUser.Name	RegularUser.EmailAddress	RegularUser.AccessLevel	RegularUser.LoginName	RegularUser.Password	RegularUser.PhoneNu	RegularUs	RegularUs	RegularUs
2	John Doe	JohnDoe@email.com	Designer	JohnDoe	password	5555555555		No	No
3									

It will consist of text fields, and yes or no options for specific configuration options which will be discussed later.

(Note: All the attributes can be edited and changed once the user is imported.)

Save your .csv file with your user information populated.

Step 2 Slide out the **Right Menu** and select **Import Users**

You will see this form.

Step 3

Select '**Column mapping is determined by template**', in the drop down select the one option, **Users**.

Check the **Validate Data** box. Leave all other options as they are. For the **Data File**, select the .csv with your user data.

Click **Import**

You will see a success message.

← Import

Column Mapping

Standard (Column mapping is in the first row of the import file)

Import Relationships

Column mapping is determined by template

Options

Validate Data

Create record if not found

Retain import file

Batch Size: 1000

Data File

Business Object: [Redacted]

Data File: [Select files...]

Encoding: UTF-8

Import Close

Creating Users Individually

You can also create single users one by one, from the **Right Menu**.

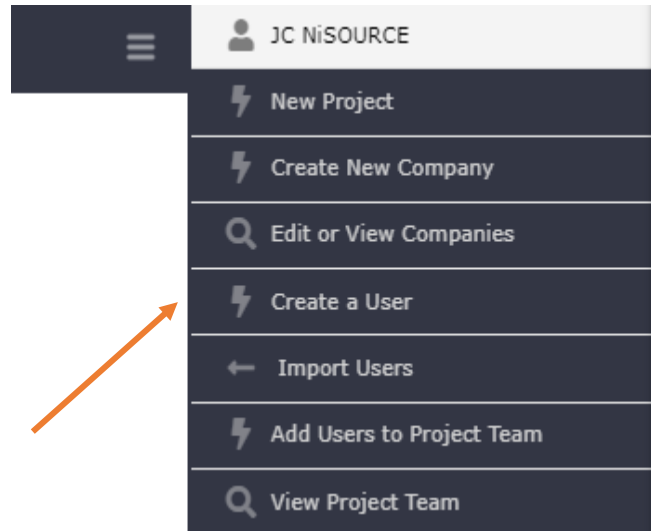
Select the Menu Option labeled **Create a User**.

You will be presented a form to fill out for the user's information. You do not have to fill out all the information, the user can once they login, however, you **DO need to provide the LOGIN NAME and EMAIL ADDRESS and ACCESS LEVEL**.

Note: If you click **Select Company**, you will see the companies that you created earlier show up for our users as an option for their company.

Click **Continue**

(More information about Roles and Access Levels can be found in the FAQ)



Just like before, the user will be emailed their User Name and Password.

Adding Users to a Project

Now that we have users in our Account, let's add them to the Projects.

In the **Right Menu**, you can click add users to Project Team.

This will give you a list of the users who are currently **not assigned** to the **Current Project**.

Click the Users and select **Continue** in the bottom right of the **Action Bar**.

They are now assigned to your Current Project and can log in and select it to get started.

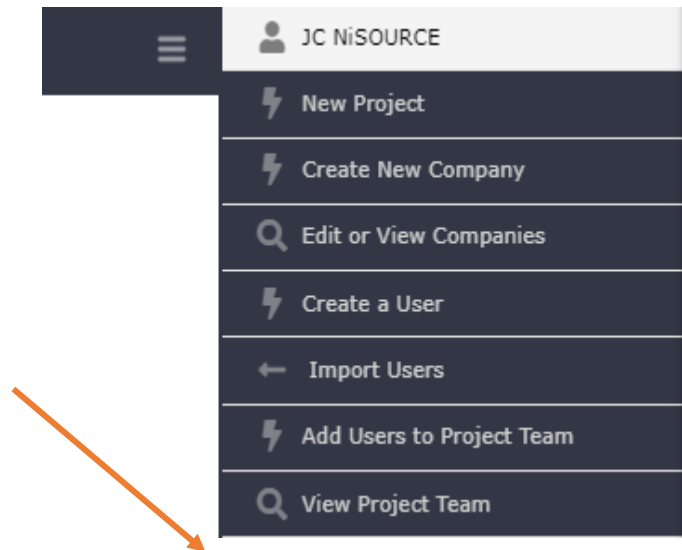
Email Users their Welcome to PHAZE Email

Select the Menu Option labeled **View Project Team**.

You will be presented a log that displays all of the team members that you have created.

Click one checkbox or many for the user profile(s) that you are notifying of the new account.

Click the **Send Welcome Email** button in the header.



Summary

In this guide, we discussed

1. Requesting a Trial
2. Logging In
3. Configuring User Profiles
4. Creating a Project
5. Creating a Company
6. Creating Users
7. Adding Users to a Project

These are the basic steps to get started with PHAZE. It is suggested that you have an understanding of how the **Processes** work, as well as the **Roles and Access Levels** in order to utilize PHAZE to its full potential. These topics will be discussed in detail in a separate, more technical document which will also be available for download.