



Document Discovery

Find docs submitted via PHAZE modules. Use document attributes and meta data to narrow the results.

The screenshot shows the 'Document Discovery' interface. At the top, there are 'Download' and 'Search Again' buttons. Below is a table with columns: DOCUMENTS, DOCUMENT TITLE, COMPANY, IS PUBLIC, SUBMITTED BY, DATE, and PROCESS TYPE. Each row represents a document with a checkbox, a truncated document title, the company name (Encor Energy), a 'Yes' status for 'IS PUBLIC', the submitter's name (Joshua), a date (08/11/2020), and the process type (Issue). A 'Go To Process' button is located at the end of each row.

Document Discovery

Quick Reference Guide

QUICK REFERENCE

- PHAZE uses Document Discovery to find documents within the system. The search criteria allows users to drill down into process attributes and document meta data to find **exactly** what they need.
- Use the **Document Discovery** button in the **Left Menu** to open the document discovery module.
- You will be presented with a form to enter your search criteria, or you can opt to find everything by entering nothing.
- The search form will search the documents for **ALL** the criteria you enter and return documents with **ANY** of the criteria you entered.

Required Fields for Document Discovery*

The form displays three required fields: 'Process Type:' with a text input field, 'From Date:' with a date picker, and 'To Date:' with a date picker. Each field is marked with an asterisk to indicate it is required.

All other fields are optional

AVAILABLE ACTIONS IN DOCUMENT DISCOVERY

- Click the **Document Link** (Left most column) to open/download the document to your device
- Click the **Go To Process** button to go the associated process
- Click the **Search Again** button to reopen the form and search again
- Click the checkboxes on the left to select certain documents and click the **Download** button to download a Zip file of these documents

Optional Document Discovery Search Criteria

Leaving an optional field blank, will fetch all results if undefined.

Field	Finds Documents that...
Is Public	Equal Yes OR No
Company	Contains the entered text
Document Title	Contains the entered text
Comment	Contains the entered text
Description	Contains the entered text
Document Type	Contains the entered text
Submitted By	Contains the entered text
Version	Contains the entered number