

ISSUE (ISS)

Overview

The Issue process is used to manage virtually any type of business process with any number of workflow steps due to the PHAZE Collaboration Loop. The Issue process initiator will submit the Issue process into the Collaboration Loop assigning any team member Ball in Court (BiC) responsibility. The BiC stakeholder will continue the collaboration by using the **Forward for Collaboration** workflow option. Doing so continues the collaboration until the process is returned to the initiator for revision or forwarded to the initiator for closure. If forwarded for closure, the initiator will have the opportunity to **Request Response Clarification** which will send the Issue process back into the Collaboration Loop.

The Issue process is initiated by any team member except for a participant with the External Stakeholder role assignment. External Stakeholders can be given the privilege to initiate Issues by the PHAZE administrator. Otherwise, External Stakeholders can only be carbon copied into the Issue process which permits them to participate in the Issue collaboration, i.e., view, comment and attach documents to the Issue.

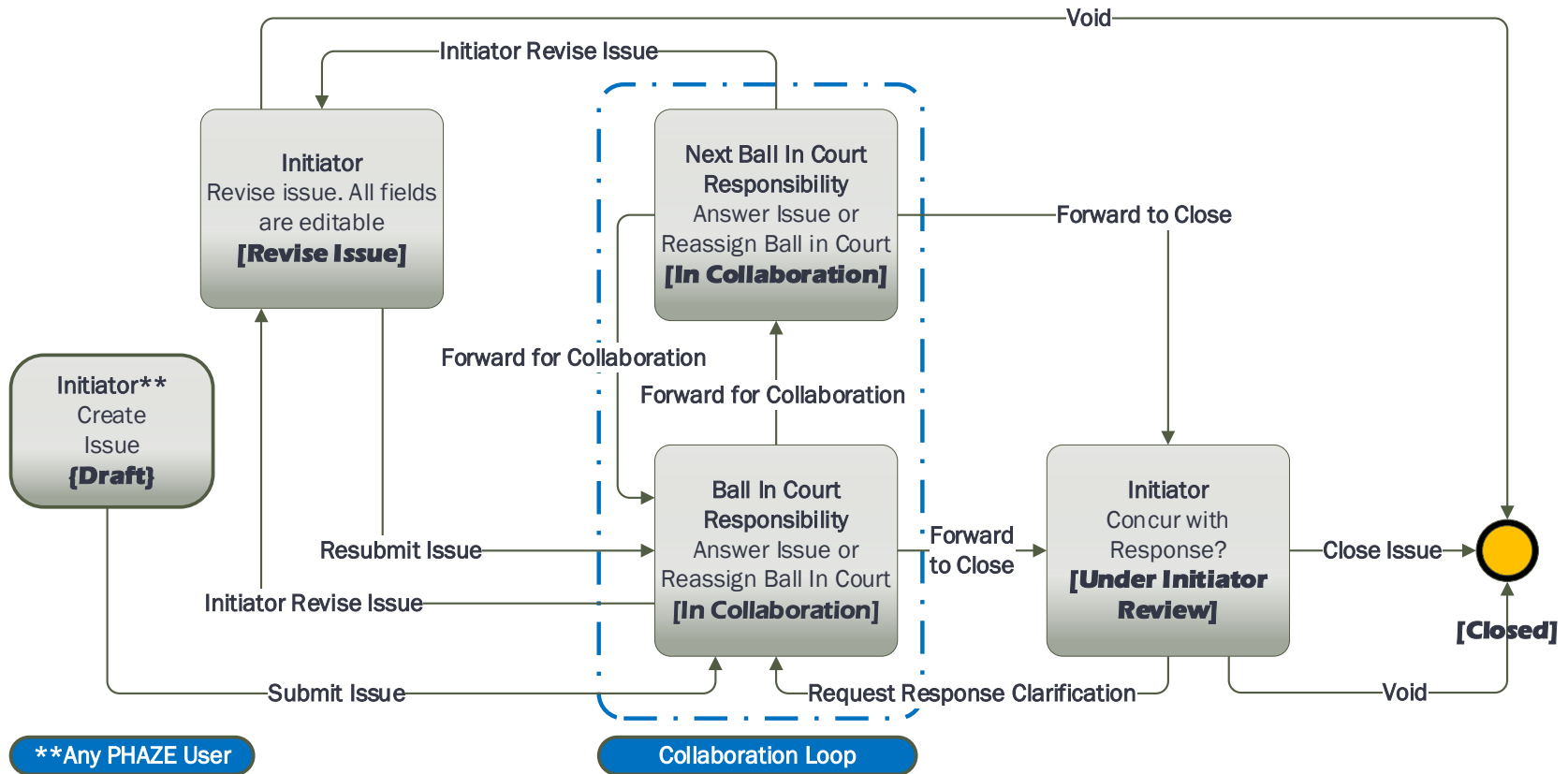
Note: External Stakeholder will have no visibility into Public or Private Issues unless 1) they are CC'd or 2) The Phaze administrator has provided the privilege to create Issues. In case two, the External Stakeholder will be permitted to view all Public Issues and only view private issues for which they have been CC'd.

Participants

The following project participants are involved in this process:

- **Initiator (Any PHAZE user and External Stakeholders with the privilege enabled)** – Initiates the process.
- **Ball In Court Responsibility** – Any team member selected for collaboration.

Workflow Diagram



Work Instruction

Initiator



The PHAZE user completes required fields and submits the Issue process instance.

Initiator Starts ISS

1. Click the Issues button in the left menu. The new Issue form displays. See Figure 1

Note: If you do not see the process that you want to create, you may not have permission to create it. Contact your administrator for assistance.

Figure 1 - Initiate an Issue form.

2. Enter the Issue information into form fields. Fields shaded in red are required.

Subject	Enter a brief descriptive title for the process instance. Follow your organization’s naming convention if provided.
Issue Type	Select the value from the picklist that best represents the type of issue that is being submitted. Use <i>Correspondence</i> if a more specific value is not available.
Discipline	Select <i>Not Applicable</i> if there is no discipline for the issue.
Requested Resolution Date	Use the Calendar and Time icons to assign a Requested Resolution Date. See Figure 2

	<p>Requested Resolution Date:*</p> <p>Calendar showing August 2020 with the 2nd highlighted.</p>
Request	Provide with detail all the pertinent information regarding your issue's subject. Additionally, you will attach supporting documents if applicable. See <i>Add Documents</i> below.
Priority	Select Urgent, High or Low from the picklist.
Is Public	All PHAZE Issues are private by default, i.e., only PHAZE users included in the collaboration will be privy to view and participate in the issue collaboration. By checking <i>"Is Public"</i> users that were not selected to participate can view and participate in the issue collaboration.

Figure 3: PHAZE Calendar

3. Optionally, select users to CC by clicking the button:
- 3.1. Select one or many PHAZE users to carbon copy the Issue to. These participants will be notified to view, comment and/or attach documents. CC'd users do not have BiC responsibility to route the Issue. See Figure 4.



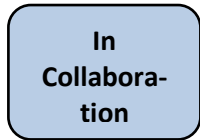
Figure 5 Select CC participants.

4. Optionally, attach any supporting documents.
 - 4.1. Click the button and then the button to attach documents. See the *Add Documents Quick Reference Guide* for detailed instructions on attaching documents.
 - 4.2. Optionally, add a comment by clicking the button. See the *Add Comment Quick Reference Guide* for detailed instructions on adding comments.
5. When you have filled in all of the required form fields and attached all supporting information, click the button to submit the process to the BiC.
6. The Select a user to send the issue to pop-up appears, click OK.
 - 6.1. Select only one (1) PHAZE user to assign BiC responsibility to; then select the Continue button which is found in the bottom left corner of the form. The Issue will be routed into the Collaboration Zone.



Figure 6 Select BiC participants.

Ball in Court Recipient



The BiC Recipient sees the process assigned in the **Activities Processes in my Court** list in the left menu. As a shortcut, use the **My Tasks** button on the **Home** screen. The BiC Recipient views the process, and may:

- Return the process to the Initiator if Issue revision is required. Follow the steps in **Return for Revision**.
- Or, **Forward for Collaboration**. Follow the steps in *Forward for Collaboration*.
- Or, **Enter a response and Forward to Close**.

BiC Recipient views the Issue

1. Locate and open the process instance routed to you.
 - 1.1. Click the process in the **Activities Processes in my Court** list in the left menu.
 - 1.2. Review the Issue. Read the information provided by the Initiator on the form, as attachments and comments.
 - 1.3. The BiC Recipient will either (See Figure 7):
 - 1.3.1. Use the **Forward for Collaboration** button in the take action bar to reassign BiC Responsibility to another PHAZE user hence entering the Issue process into the Collaboration Loop, or
 - 1.3.2. Use the **Forward To Close** button in the take action bar to route the issue to the Initiator for closure.

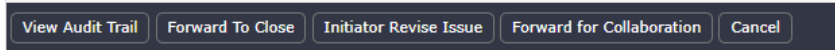


Figure 8 Take Action Bar

- 1.3.3. If **Forward To Close** is the desired action, a Response must be provided.

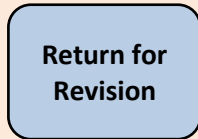
Response	The BiC Responsibility stakeholder must enter a response to the issue.
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- 1.3.4. The Issue process will be routed to the Initiator for closure.

OPTIONAL

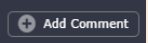
This step only occurs if the BiC Recipient is returning the ISS to the Initiator.

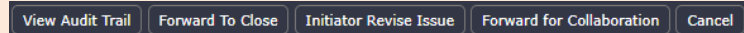
BiC Recipient



If the process requires revisions, the BiC Recipient returns the process to the Initiator.

Initiator Return for Revision

1. Locate and open the ISSUE that you wish to return.
2. Use Add Comment button  to enter a comment.
3. Click the **Initiator Revise Issue** button in the take action bar:

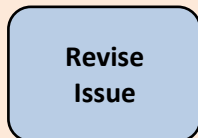


4. The Issue will be returned to the Initiator.

OPTIONAL

This step only occurs if the BiC Recipient has returned the ISS to the Initiator.



Initiator



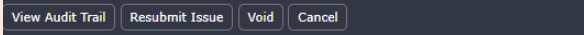
If the BiC Recipient returns the process to the Initiator, the Initiator makes any corrections as required and resubmits.

Initiator Updates ISS

1. Locate and open the ISS that needs revision.
2. Review the comment(s) explaining why the ISS was returned.
3. Update any required information per the return comment(s).
4. Optionally, attach any supporting documents.

4.1. Click the  button and then the  button to attach documents. See the *Add Documents Quick Reference Guide* for detailed instructions on attaching documents.

5. Click the **Resubmit Issue** button in the take action bar:



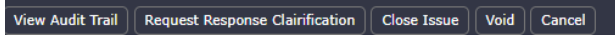
6. Optionally: **Void** the Issue if applicable.

Initiator Close

Under Initiator Review

Initiator Reviews the Response for Issue Closure

1. Locate and open the process instance routed to you.
 - 1.1. Click the process in the **Activities Processes in my Court** list in the left menu.
 - 1.2. Review the Issue. Read the information provided while in the Collaboration Loop as attachments and comments.
 - 1.3. The Initiator will either
 - 1.3.1. Use the **Request Response Clarification** button in the take action bar to reassign return the process into the Collaboration Loop, or
 - 1.3.2. Use the **Close Issue** button in the take action bar to conclude the routing of the Issue and close it.



- 1.4. Optionally: **Void** the Issue if applicable.