

VENDOR Collaboration (VDRCLB)

Overview

The Vendor Collaboration process is used to manage virtually any type of business process with any number of workflow steps due to the PHAZE Collaboration Loop. The Vendor Collaboration process initiator will submit the Vendor Collaboration 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 Collaboration process back into the Collaboration Loop.

The Vendor Collaboration process is initiated by a PHAZE project team member in the External Stakeholder role assignment. External Stakeholders can be given the privilege to initiate Vendor Collaborations by the PHAZE administrator. Otherwise, non-privileged External Stakeholders can only be carbon copied into the Vendor Collaboration process which permits them to participate in the Vendor collaboration, i.e., view, comment and attach documents to the Collaboration.

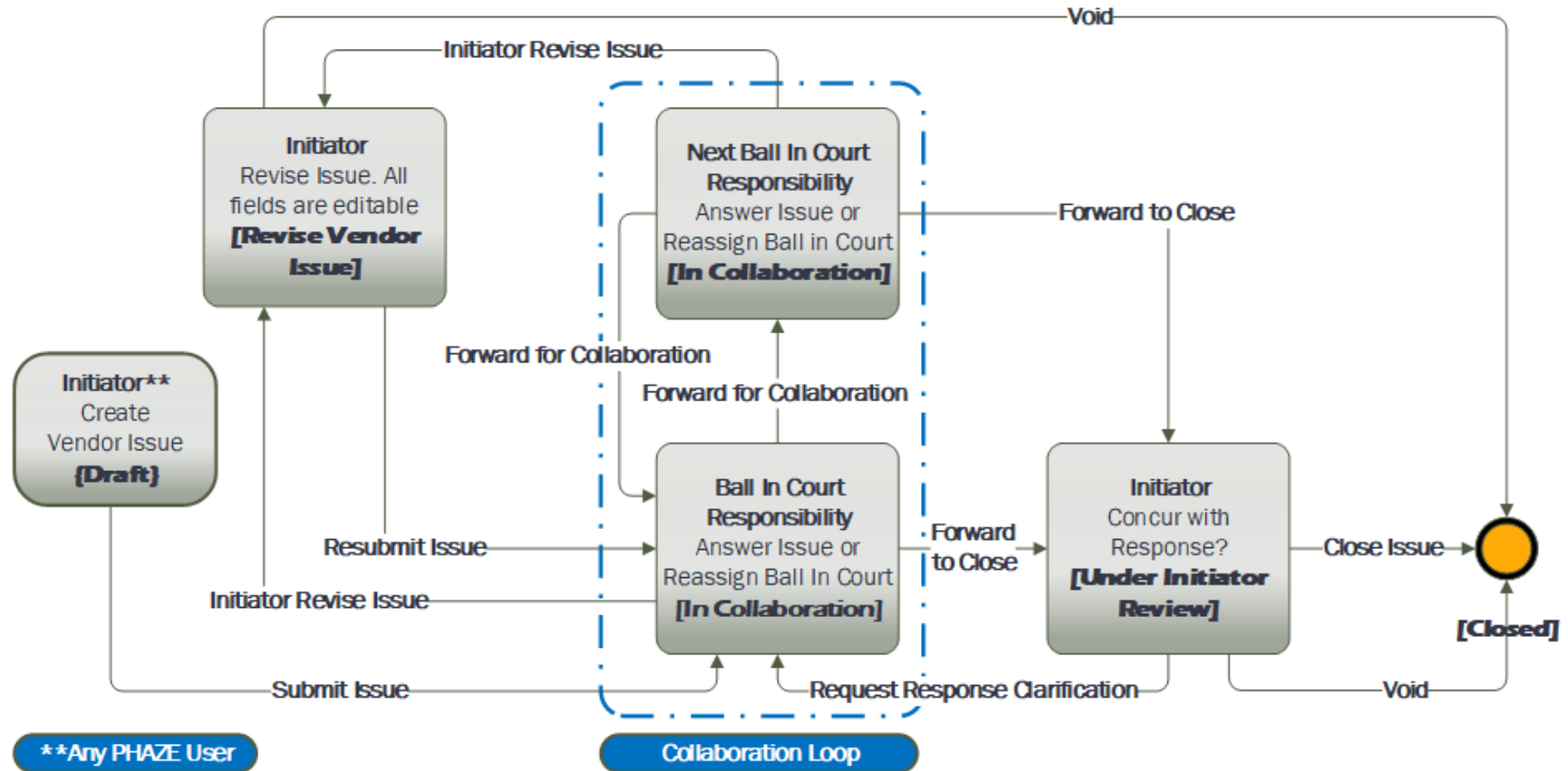
Participants

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.

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Workflow Diagram



VENDOR Collaborations (VDRCLB)

In the left menu, navigate to **PROJECT ACTIONS > VENDOR COLLABORATIONS**.

The **Vendor Collaborations** log will load.

 Vendor Collaborations

Work Instruction


Initiator

Draft

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

Initiator Starts VDRCLB

1. Click the **Create Vendor Collaboration** button. The new Vendor Collaboration 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.

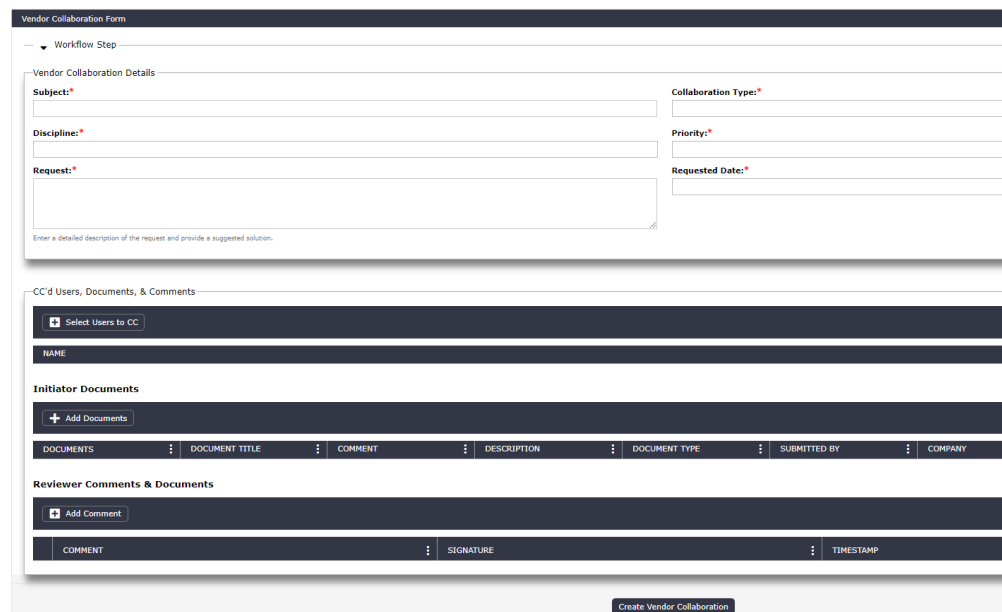
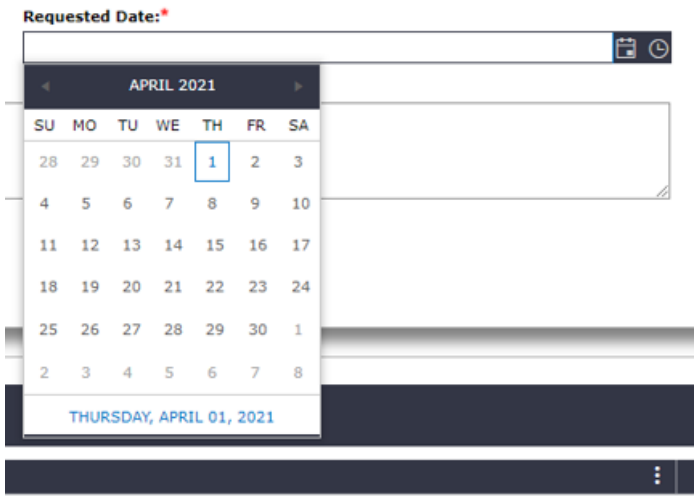



Figure 1 - Initiate an Collaboration form.

2. Enter the Vendor Collaboration 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.
Collaboration Type	Select the value from the picklist that best represents the type of collaboration that is being submitted. .
Discipline	Select <i>Not Applicable</i> if there is no discipline for the Collaboration.

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Requested Resolution Date	<p>Use the Calendar and Time icons to assign a Requested Resolution Date. See Figure 2</p>  <p>Figure 3: PHAZE Calendar</p>
Request	Provide with detail all the pertinent information regarding your collaboration's subject. Additionally, you will attach supporting documents if applicable. See <i>Add Documents</i> below.
Priority	Select Urgent, High or Normal from the picklist.
Is Public	All PHAZE Vendor Collaborations are private by default, i.e., only PHAZE users included in the collaboration will be privy to view and participate in the collaboration. By checking " Is Public " users that were not selected to participate can view and participate in the collaboration.

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

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Collaboration. See Figure 4.



Figure 5 Select CC participants.

4. Optionally, attach any supporting documents.

4.1. Click the **Add Documents** button and then the **Select files...** 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 **Add Comment** 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 **Create Vendor Collaboration** button to submit the process to the BiC.

6. The Select a user to send the collaboration 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 Collaboration will be routed into the Collaboration Zone.

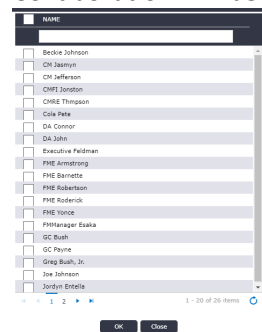


Figure 6 Select BiC participants.

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Ball in Court Recipient

In Collaboration

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 Collaboration 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 Collaboration

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 Collaboration. 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 Vendor Collaboration process into the Collaboration Loop, or
 - 1.3.2. Use the **Forward To Close** button in the take action bar to route the collaboration to the Initiator for closure.

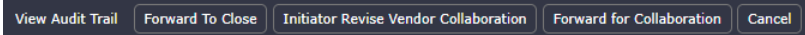


Figure 8 Take Action Bar

- 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 Collaboration.
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- 1.3.4. The Collaboration process will be routed to the Initiator for closure.



OPTIONAL

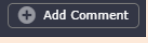
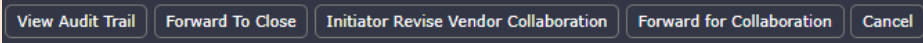
This step only occurs if the BiC Recipient is returning the VDRCLB to the Initiator.

BiC Recipient

Return for Revision

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

Initiator Revise Collaboration

1. Locate and open the Vendor Collaboration that you wish to return.
2. Use Add Comment button  to enter a comment.
3. Click the **Initiator Revise Vendor Collaboration** button in the take action bar:
 
4. The Collaboration will be returned to the Initiator.



OPTIONAL

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

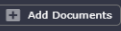

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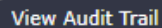
Initiator

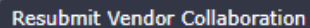
Revise
Vender
Collaborat
ion

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

Initiator Updates VDRCLB

1. Locate and open the VDRCLB that needs revision.
2. Review the comment(s) explaining why the VDRCLB 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 Vendor Collaboration** button in the take action bar:









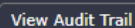
6. Optionally: **Void** the Collaboration if applicable.

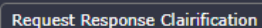
Initiator Close

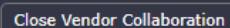
Under
Initiator
Review

Initiator Reviews the Response for Vendor Collaboration 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 Vendor Collaboration. 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 Vendor Collaboration** button in the take action bar to conclude the routing of the Vendor Collaboration and close it.











- 1.4. Optionally: **Void** the Vendor Collaboration if applicable.