Overview

The Vendor 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 Vendor Issue process initiator will submit the Vendor 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 Vendor Issue 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 Issues by the PHAZE administrator. Otherwise, non-privileged External Stakeholders can only be carbon copied into the Vendor Issue process which permits them to participate in the Vendor Issue collaboration, i.e., view, comment and attach documents to the Issue.
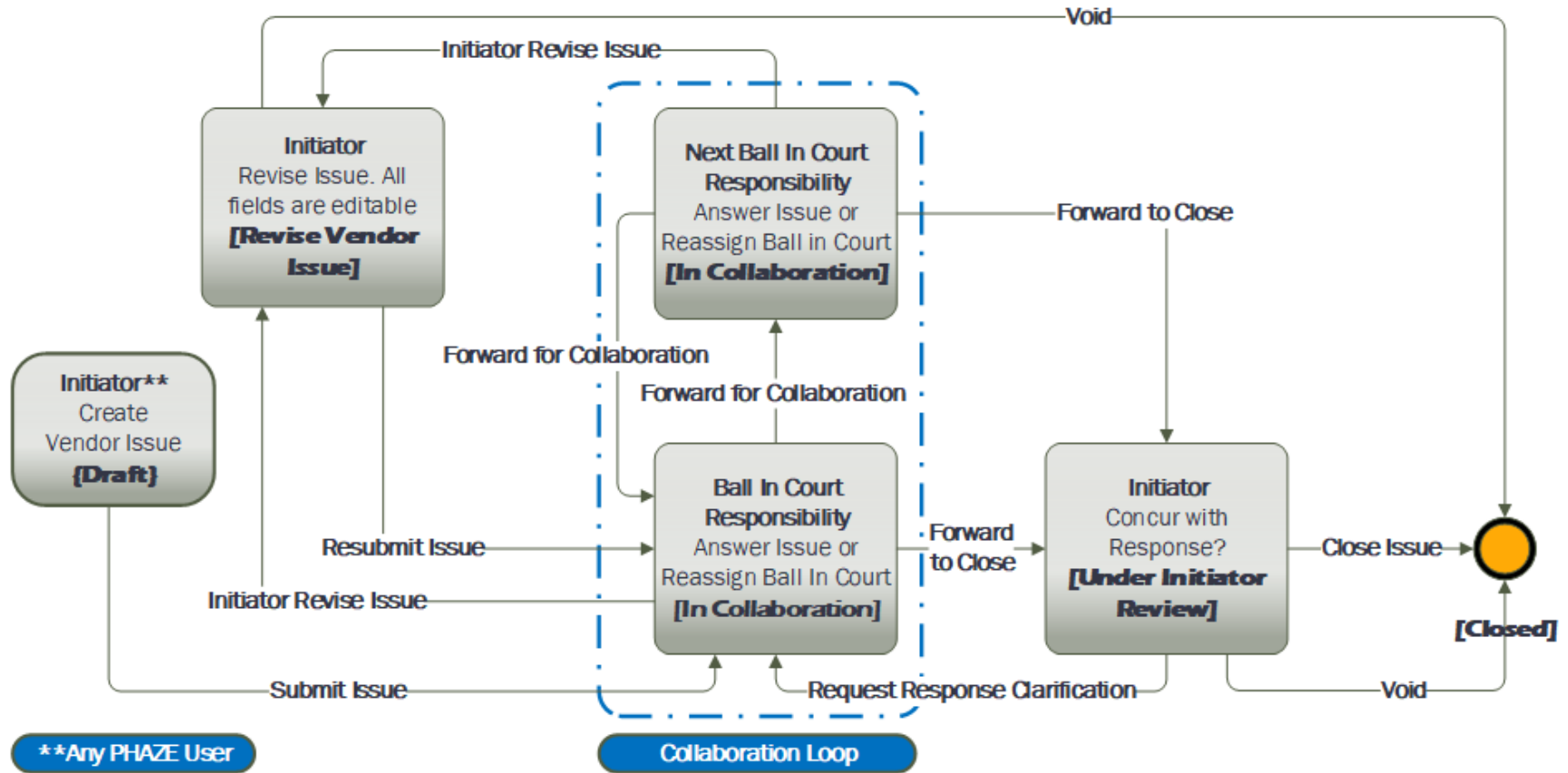
Participants

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

Draft

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

Initiator Starts VDRIS

1. Click the ⬚ Issues button in the left menu. The new Vendor 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.
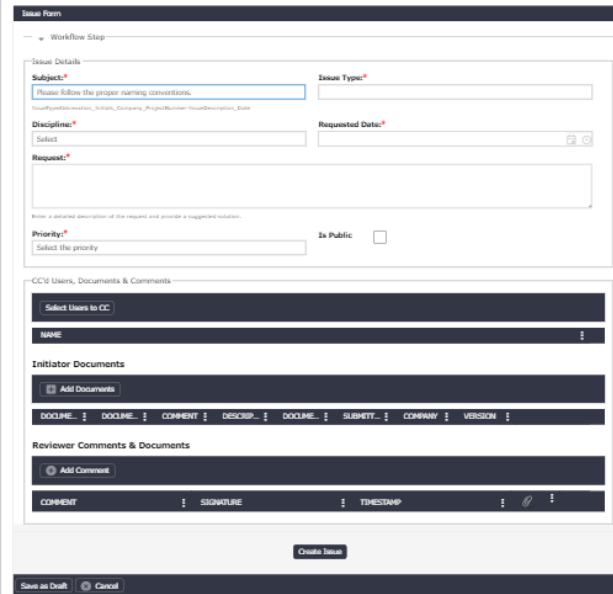

Figure 1 - Initiate an Issue form.

2. Enter the Vendor 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 *Correspondence* if a more specific value is not available.
Discipline	Select *Not Applicable* 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

VENDOR ISSUE (VDRIS)

Figure 3: PHAZE Calendar

Request	Provide with detail all the pertinent information regarding your issue's subject. Additionally, you will attach supporting documents if applicable. See *Add Documents* below.
Priority	Select Urgent, High or Low from the picklist.
Is Public	All PHAZE Vendor 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 *"Is Public"* users that were not selected to participate can view and participate in the issue collaboration.

3. Optionally, select users to CC by clicking the button:
    3.1. Select one or many PHAZE users to carbon copy the Vendor 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.
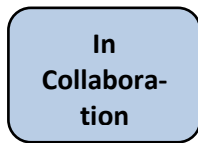

Figure 5 Select CC participants.

4. Optionally, attach any supporting documents.

   4.1. Click the [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 Issue] 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:
In Collaboration	- 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 Vendor 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.
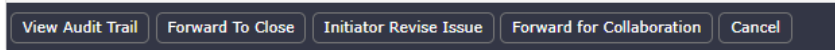
        | View Audit Trail | Forward To Close | Initiator Revise Issue | Forward for Collaboration | Cancel |

        Figure 8 Take Action Bar

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

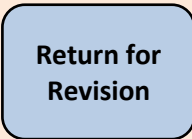 | | |
        |---|---|
        | Response | The BiC Responsibility stakeholder must enter a response to the issue. |

        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 VDRIS to the Initiator.
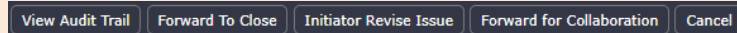
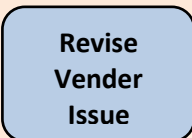| **BiC Recipient** **Return for Revision**	If the process requires revisions, the BiC Recipient returns the process to the Initiator. **Initiator Return for Revision** 1. Locate and open the Vendor ISSUE that you wish to return. 2. Use Add Comment button ⊕ Add Comment to enter a comment. 3. Click the *Initiator Revise Issue* button in the take action bar: | View Audit Trail | Forward To Close | Initiator Revise Issue | Forward for Collaboration | Cancel | 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.
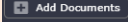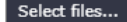
| **Initiator** **Revise Vender Issue**	If the BiC Recipient returns the process to the Initiator, the Initiator makes any corrections as required and resubmits. **Initiator Updates VDRIS** 1. Locate and open the VDRIS that needs revision. 2. Review the comment(s) explaining why the VDRIS was returned. 3. Update any required information per the return comment(s). 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.

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

[View Audit Trail] [Resubmit Issue] [Void] [Cancel]
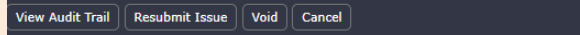
6. Optionally: **Void** the Issue if applicable.

Initiator Close

Under Initiator Review

Initiator Reviews the Response for Vendor 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 Vendor 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 Vendor Issue and close it.

        [View Audit Trail] [Request Response Clairification] [Close Issue] [Void] [Cancel]
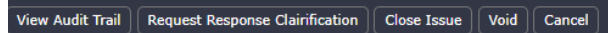
    1.4. Optionally: **Void** the Vendor Issue if applicable.