

Collaborations (CLB)

Overview

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

The Collaborations 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 Collaborations by the PHAZE administrator. Otherwise, External Stakeholders can only be carbon copied into the Collaborations process which permits them to participate in this collaboration, i.e., view, comment and attach documents to the Collaborations.

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

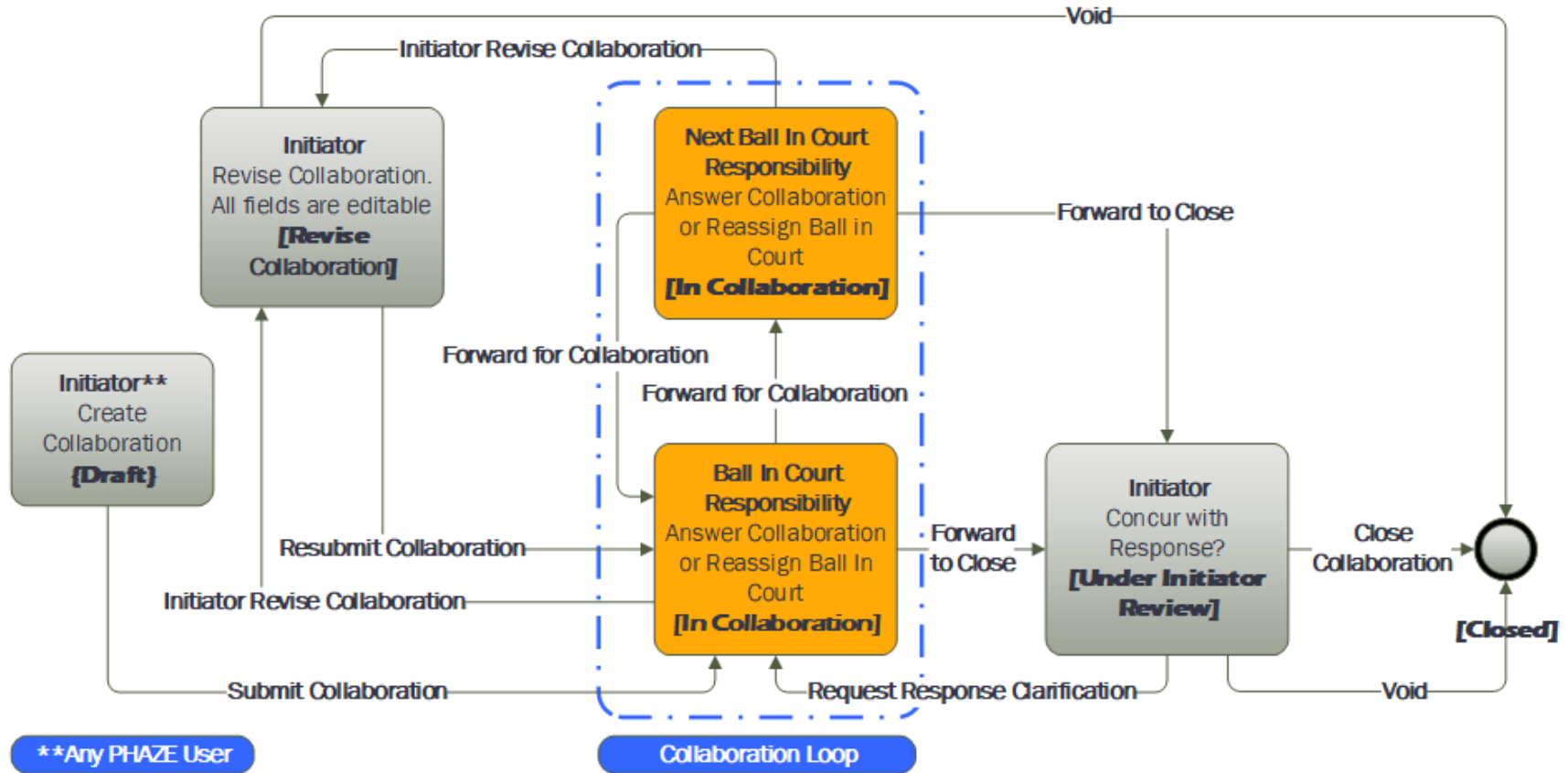
Participants

The following project participants are involved in this process:

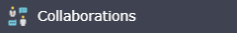
- **Initiator (Any PHAZE user and External Stakeholders with the privilege enabled)** – Initiates the process.
- **Ball In Court Responsibility** – Any team member selected for collaboration.

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Workflow Diagram



Work Instruction

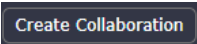
In the left menu, navigate to **PROJECT ACTIONS > COLLABORATIONS**.  The **Collaborations** log will load.


Initiator

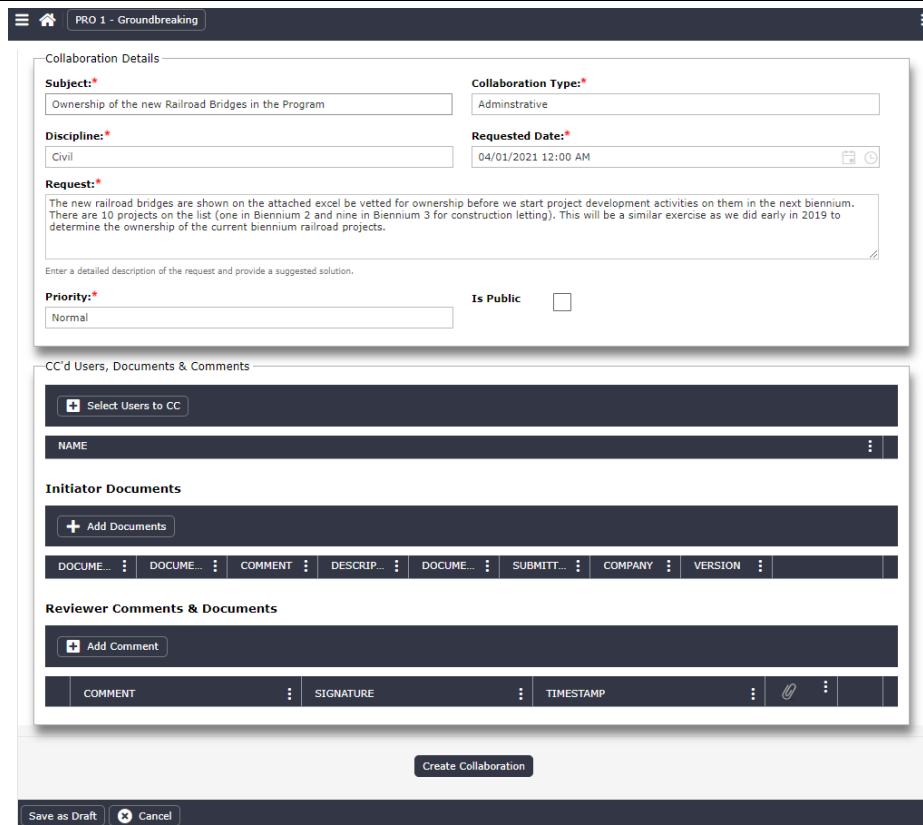
Draft

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

Initiator Starts Collaborations

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

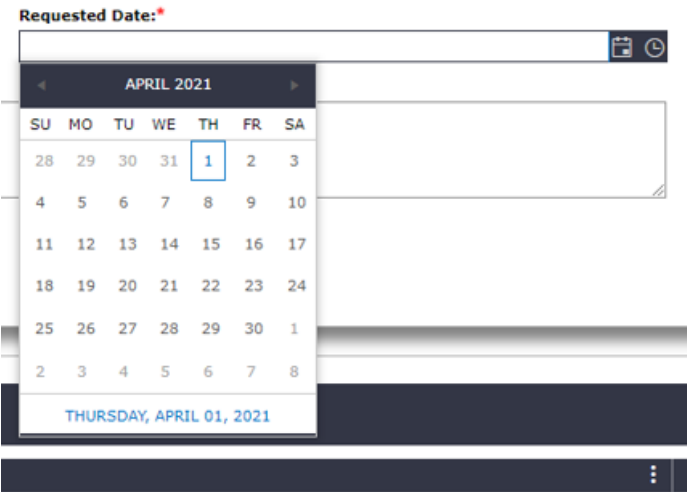


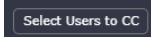
The screenshot shows the 'Collaboration Details' form. Fields with red asterisks indicate required fields: Subject, Discipline, Request, Priority, and Collaboration Type. The 'Subject' field contains 'Ownership of the new Railroad Bridges in the Program'. The 'Collaboration Type' is 'Administrative'. The 'Discipline' is 'Civil'. The 'Requested Date' is '04/01/2021 12:00 AM'. The 'Request' field contains a detailed description of the request regarding railroad bridges. The 'Priority' is 'Normal'. There is an 'Is Public' checkbox which is unchecked. Below the form are sections for 'CC'd Users, Documents & Comments', 'Initiator Documents', and 'Reviewer Comments & Documents'. At the bottom, there is a 'Create Collaboration' button and 'Save as Draft' and 'Cancel' options.

Figure 1 - Initiate a Collaboration form.

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

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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.
Requested Date	<p>Use the Calendar and Time icons to assign a Requested Date.</p>  <p>Figure 2: 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 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.

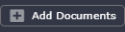

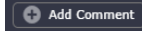
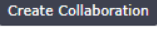
3. Optionally, select users to CC by clicking the button: 
 - 3.1. Select one or many PHAZE users to carbon copy the Collaboration to. These participants will be notified to view, comment and/or attach documents. CC’d users do not have BiC responsibility to route the Collaboration. See

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Figure 3.



Figure 3 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 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

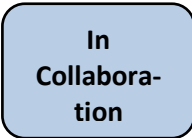
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Collaboration will be routed into the collaboration Zone.



Figure 4 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 Collaboration revision is required. Follow the steps in **Initiator Revise Collaboration**.
- 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 5)
 - 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 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.

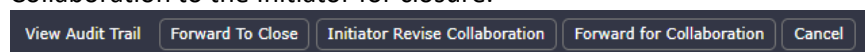


Figure 5. Take Action Bar

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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 CLB to the Initiator.

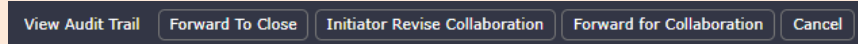
BiC Recipient

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 Collaboration that you wish to return.
2. Use Add Comment button  to enter a comment.
3. Click the **Initiator Revise Collaboration** button in the take action bar:



4. The Collaboration will be returned to the Initiator.

OPTIONAL

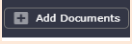

This step only occurs if the BiC Recipient has returned the CLB to the Initiator.

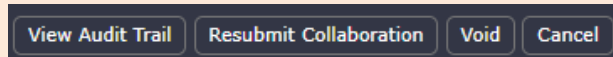
Initiator

Revise
Collaboration

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

Initiator Updates CLB

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



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

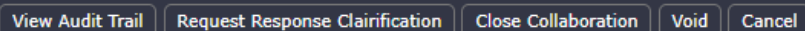
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Initiator Close

**Under
Initiator
Review**

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



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