



Discussion Groups

Agency/Higher-Ed

Purpose

- ▶ Collaborating with Team Members
 - ▶ In Selected Business Processes (BPs) the task owner can initiate a Discussion Group to solicit input from other project team members
 - ▶ Invited members of the discussion group can contribute their own text comments and attach documents
 - ▶ All participants can view each others comments and attachments

Discussion Group Owner

- ▶ The Task Owner Can:
 - ▶ Select which, if any, of the comments and/or markups to use in creating the final comments or markups for the task
 - ▶ Hide or delete these comments
 - ▶ Consolidate comments for use in creating the final comment or markup

Initiate a Discussion Group

- ▶ Open a record and click the Discussion button

The screenshot shows a web browser window titled "Design Reviews - Project No. OCI-090004 - Mozilla Firefox". The address bar shows the URL: https://ohio-dev-unifier.oracleindustry.com/bp/process/task/open?task_id=187572&model=udr&proj_id=1021&initiateBP=&bulk. The browser's menu bar includes File, Edit, View, Actions, and Help. The "Workflow Actions" toolbar contains buttons for Send, Save, Spelling..., Discussion (highlighted with a red box and a red arrow), Review, and Close Window. Below the toolbar is the "General" tab, which displays the following information:

Organization:	Department of Administrative Service:	Record Number:	DR-0023
Project Number:	OCI-090004	Creator:	Katie Tuttle
Project Name:	OAKS CI Training 4	Creation Date:	06/26/2017 11:28 AM (UTC-8)
Project Location:	4200 Surface Road	Status:	Pending

Below the "General" tab is the "Action Details" section, which includes a link to view latest content, "To..." and "Cc..." input fields, and buttons for "Send For:", "Task Notes:", and "Workflow Progress".

The "Design Reviews" section shows an "Attachment Index : (5)" and "Current View: All". It displays a table of attachments:

File Name	Type	Status
Chrysanthemum.jpg		
Koala.jpg		
Lighthouse.jpg		

At the bottom of the interface, there are buttons for "Add", "Copy", "Import", "Remove", "Comments", and "Download". The footer shows "Linked Records (0)", "General Comments", and "Linked Mail (0)".

Initiate a Discussion Group

- ▶ The Discussion Group Invitation window opens
 - ▶ Name the discussion group
 - ▶ Click “To” and choose the user(s) to include in the discussion group
 - ▶ Click Send

The screenshot shows a web application interface with a 'Discussion' button highlighted in red. An arrow points from this button to a 'Discussion Group' dialog box. The dialog box contains the following fields:

- Discussion Group: Discuss the 4/15/16 Design Review
- Discussion Group Ends: 04/23/2016 05:00 PM (UTC-8)
- To...: Barbara Taylor;Khorl Baylor;Lindsay Deering;Rhonda Hagemeyer;Rita Ni
- Notes: What does everyone think about the initial drawings?

The background application shows a 'Design Reviews' page with the following details:

- Organization: Department of Administrative Services
- Project Number: OCI-090004
- Project Name: OAKS CI Training 4
- Project Location: 4200 Surface Road

The 'Attachments' table is as follows:

File Name	Type	Status
Chrysanthemum.jpg		
Koala.jpg		
Lighthouse.jpg		

Discussion Group Notes

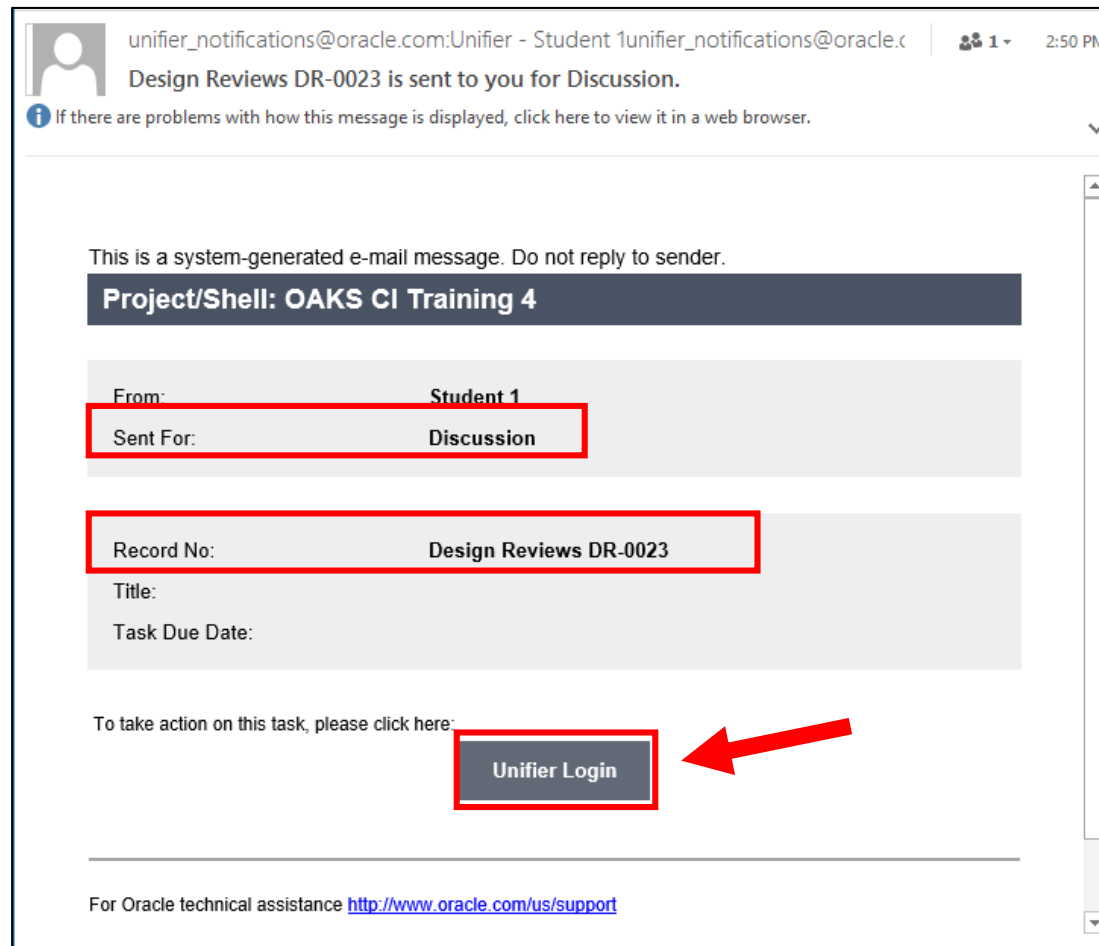
- ▶ When a discussion group is initiated, ownership of the Task remains with the initiator (in this case, the PM)
- ▶ Discussion group members may enter General Comments but they cannot initiate workflow actions or close the discussion group.

Participating in a Discussion Group

- ▶ If you are invited to join a discussion group, a new Task will appear in your Task log and you will receive an email message
- ▶ The “Sent for” column of the Task log will indicate “Discussion” distinguishing it from business process workflow related tasks
- ▶ Discussion group participants can add and save comments within the discussion group

Email Notification

- ▶ When users are asked to participate in a discussion group, they will receive a task email.
- ▶ Click on the “Unifier Login” button to participate in the discussion



Task List

- ▶ Task for Discussion will show a people icon

The screenshot displays the Oracle Primavera Unifier (Development) interface. The top navigation bar shows the user 'Katie Tuttle' and a 'Sign Out' option. The main content area is titled 'Tasks' and contains a table of task entries. A red arrow points to the 'Tasks' menu item in the left sidebar. A red box highlights the first task row in the table, which has a people icon in the 'Origin' column.

	Origin	Business Process	Record Number	Title	Record Due	From	Sent for	Task Due
⚙️ 👤	OAKS CI Training 4	Design Reviews	DR-0023			Student 1, soo	Discussion	
✓	OAKS CI Training 4	Request for Interp...	RFI-00050	Katie's RFI		Katie Tuttle,soo	Response Accept...	05/31/2017 1
✓	OAKS CI Training 4	Contract	CON-00018	PO Test		Katie Tuttle,soo	Final Review	
✓	OAKS CI Training 4	Action Items	AI-00164	test 1	05/01/2017 09:14 ...	Katie Tuttle,soo	Response Support	
✓	OAKS CI Training 4	Design Reviews	DR-0022			Katie Tuttle,soo	Initial Review	05/05/2017 0
✓	OAKS CI Training 4	Subcontractor/Su...	SSD-0142	Katie's Concrete		Shauna Hooks,soo	Declaration Approval	
✓	OAKS CI Training 4	Contractor Pay R...	CPR-0037	Stored Materials T...		Katie Tuttle,soo	Payment Process...	
✓	OAKS CI Training 4	Subcontractor/Su...	SSD-0143	PPH		Student 1,soo	Associate Declar...	
✓	OAKS CI Training 4	Action Items	AI-00159	Katie Marie	04/19/2017 10:58 ...	Katie Tuttle,soo	Review	
✓	OAKS CI Training 4	Design Reviews	DR-0020			Katie Tuttle,soo	Initial Review	04/09/2017 1.
✓	OAKS CI Training 4	Action Items	AI-00157	katie	04/13/2017 11:52 ...	Katie Tuttle,soo	Review	
✓	OAKS CI Training 4	Design Reviews	DR-0019			Student 5,soo	Initial Review	03/26/2017 1
✓	OAKS CI Training 4	Design Reviews	DR-0012			Student 1,soo	Initial Review	03/26/2017 1

Total: 167

Participate in a Discussion Group

- ▶ Participants can view all attached files by clicking on them
- ▶ To submit comments, click General Comments and attach a comments log
- ▶ You can also add comments to individual documents

Design Reviews - Project No. OCI-090004 - Mozilla Firefox

https://ohio-dev-unifier.oracleindustry.com/bp/process/task/open?task_id=187589&parent_id=40&viewOnly=2&project_id=1021&_uref=110%

File Edit View Actions Help

Accept Task Decline Task Review Close Window

Design Reviews

General

General

Organization: Department of Administrative Services Record Number: DR-0023

Project Number: OCI-090004 Creator: Katie Tuttle

Project Name: OAKS CI Training 4 Creation Date: 06/26/2017 11:28 AM (UTC-8)

Project Location: 4200 Surface Road Status: Pending

Task Details

From: Student 1 Sent For: Discussion Discussion Notes

To: Moenique Morris; Bill Schwertfager; More... What does everyone think about the initial drawings?!

Design Reviews

Attachment Index : (5) Current View: All

New Rename Move Delete 5 Item(s)

Attachments	File Name	Type	Status

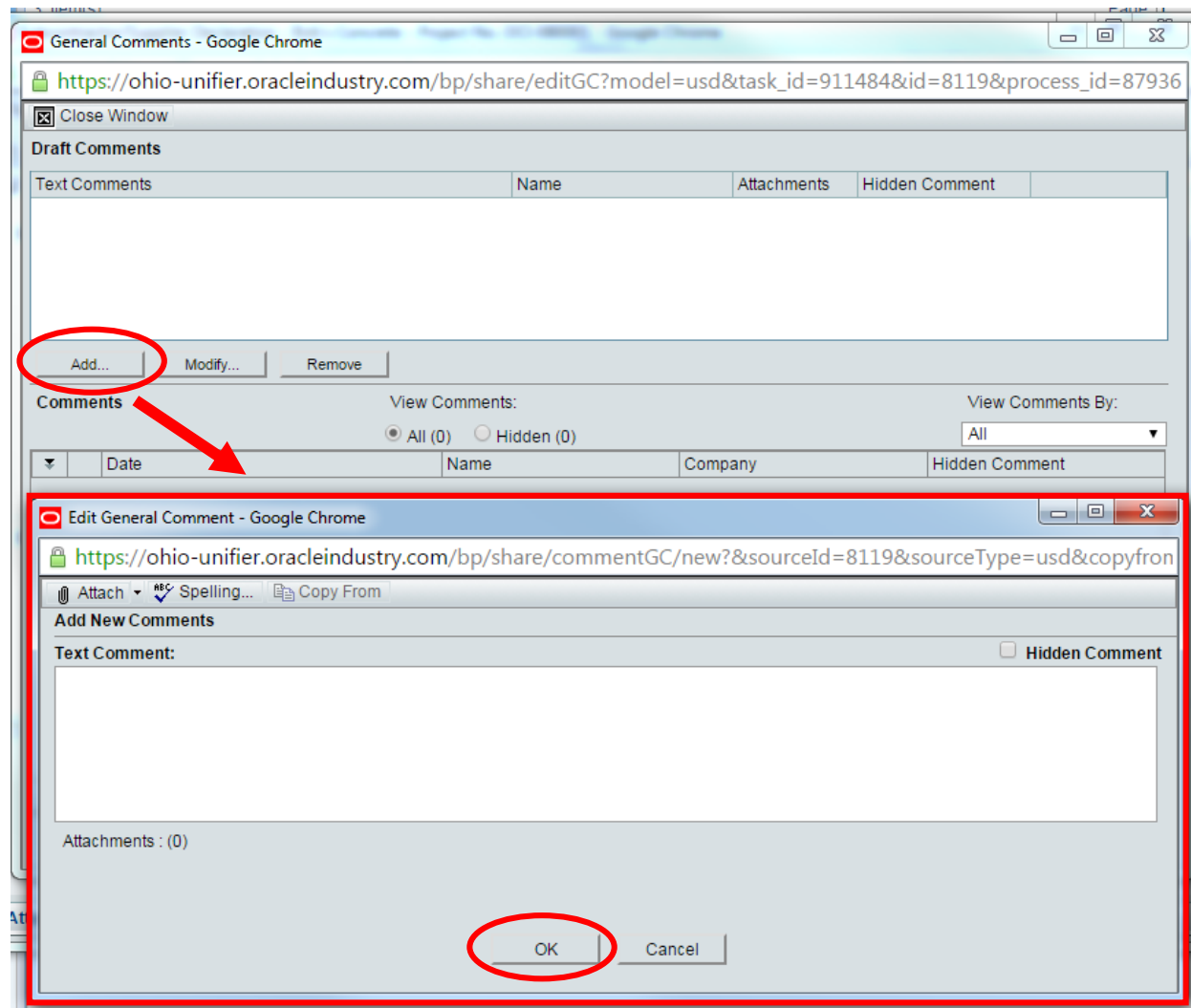
Comments Download Find References

Linked Records (0) **General Comments** Linked Mail (0)

This form will be "view-only" except for the General Comments area

Add Comments / Attachments

- ▶ Add text comments and/or attachments by clicking Add and entering them into the “Edit General Comment” dialog box



Closing a Discussion Group

- ▶ When a discussion group is closed, all invited participants will receive an email notification
 - ▶ To close a discussion group:
 - ▶ The initiator of the group can close the discussion at any time by clicking “End Discussion Group”
 - ▶ This removes the task from each participant’s task log, regardless of whether or not they have completed the task.
- ▶ **Note:** If the record itself (design review, etc.) is closed, then the discussion group will automatically close with it.

Warning

- ▶ Using the “Undo Accept Task” function after a Discussion Group has been initiated will disconnect the Discussion Group
- ▶ All comments and attachments provided by the participants will be deleted and will be unrecoverable

Managing Comments

- ▶ Once the Discussion Group has completed review of the design submission, the Project Manager will close the Discussion Group and review the comments made by the group members

Discussion Groups

- ▶ You cannot participate in a discussion group on the Create or End steps of a business process.
- ▶ The task owner can select which, if any, of the comments and/or markups to use in creating their final comments or markups for the task. They can also hide or delete these comments, or consolidate them for use in creating the final comment or markup.

Questions?

Please contact OAKS CI Support Desk:

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