



# Working with Discussion Groups

# Discussion Groups

- ▶ 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
  - ▶ Eligible participants are pulled from the BP: Add Assignee List
  - ▶ 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 Groups

- ▶ 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

# Discussion Groups

- ▶ Initiate a Business Process (BP) discussion group
  - ▶ You may initiate a Discussion Group to help you draft your comments or markups
- ▶ Participate in a BP discussion group
  - ▶ You have been requested to participate in a discussion group by another user who wants input before completing a task



# Initiate a Discussion Group

Subcontractor/Supplier Declaration - Bob's Concrete - Project No. OCI-080001 - Google Chrome

https://ohio-unifier.oracleindustry.com/bp/process/task/open?task\_id=911484&model=usd&project\_id=1003&initiateBF

File Edit View Actions Help Workflow Actions -Select-

Send Save Spelling... Undo Accept Task Add Attachment Discussion Close Window

Subcontractor/Supplier Declaration

**General**

General

Organization: Department of Administrative Services Record Number: SSD-0008  
Project Number: OCI-080001 Creation Date: 09/14/2015 10:48 AM (UTC-8)  
Project Name: Agency General Projects Test Creator: Katie Tuttle  
Project Location: OAKS CI Administration Status: Pending  
Title: Bob's Concrete  
Contract Name: Contractor Name: OCI Test General

Professional Services Agreement [test](#)  
Name:

**Declaration Information**

Type: Subcontractor  
Subcontractor/Supplier: Bob's Concrete  
Federal Tax ID: 31-0001  
Primary Officer 1: Bob Brown  
Address Line 1: 1200 Surface Rd

**Action Details**

([Click here](#) to view latest content)

To:   
Cc:   
Send For:

Task Notes:

Attachments (0) [Linked Records \(0\)](#) [General Comments](#) [Linked Mail \(0\)](#)

- ▶ Open a record and click the Discussion Group button

# Initiate a Discussion Group

- ▶ Design Review discussion groups can be initiated from the Detailed Review step

The screenshot displays a web browser window titled "Design Reviews - Project No. OCI-080001 - Google Chrome". The address bar shows the URL: [https://ohio-unifier.oracleindustry.com/bp/process/task/open?task\\_id=912502&model=udr&project\\_id=1003&initiateBP](https://ohio-unifier.oracleindustry.com/bp/process/task/open?task_id=912502&model=udr&project_id=1003&initiateBP). The browser's menu bar includes "File", "Edit", "View", "Actions", and "Help". The "Workflow Actions" dropdown is set to "-Select-".

The main content area is titled "Design Reviews" and includes a "General" section with the following fields:

- Organization: Department of Administrative Services
- Record Number: DR-0005
- Project Number: OCI-080001
- Creator: Katie Tuttle
- Project Name: Agency Gen
- Project Location: OAKS CI Ad

The "Action Details" section contains a link: "(Click here to view latest content)". Below this are fields for "To...", "Cc...", and "Send For:". The "Design Reviews" section shows "Attachment Index : (0)", "Current View: All", and "0 Item(s)".

A red box highlights the "Discussion" button in the browser's menu bar. A red arrow points from this button to a "Discussion Group" dialog box. The dialog box has the following fields:

- Discussion Group: \*
- Discussion Group Ends: \*
- To: \*
- Notes:

The dialog box also includes "Send", "End Discussion Group", and "Close Window" options.

# 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
  - ▶ A red \* notes a required field

The screenshot shows a web browser window titled "Discussion Group - Google Chrome". The address bar contains the URL: [https://ohio-unifier.oracleindustry.com/bp/share/dis/getGroup?task\\_id=91250](https://ohio-unifier.oracleindustry.com/bp/share/dis/getGroup?task_id=91250). The browser's menu bar includes "File", "Send", "End Discussion Group", and "Close Window". The main content area contains a form with the following fields:

- "Discussion Group:" followed by a text input field with a red asterisk to its right.
- "Discussion Group Ends:" followed by a date picker field with a red asterisk to its right.
- "To..." followed by a dropdown menu with a red asterisk to its right.
- "Notes:" followed by a large, empty text area with a red asterisk to its right.

# Discussion Group

- ▶ Note: 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

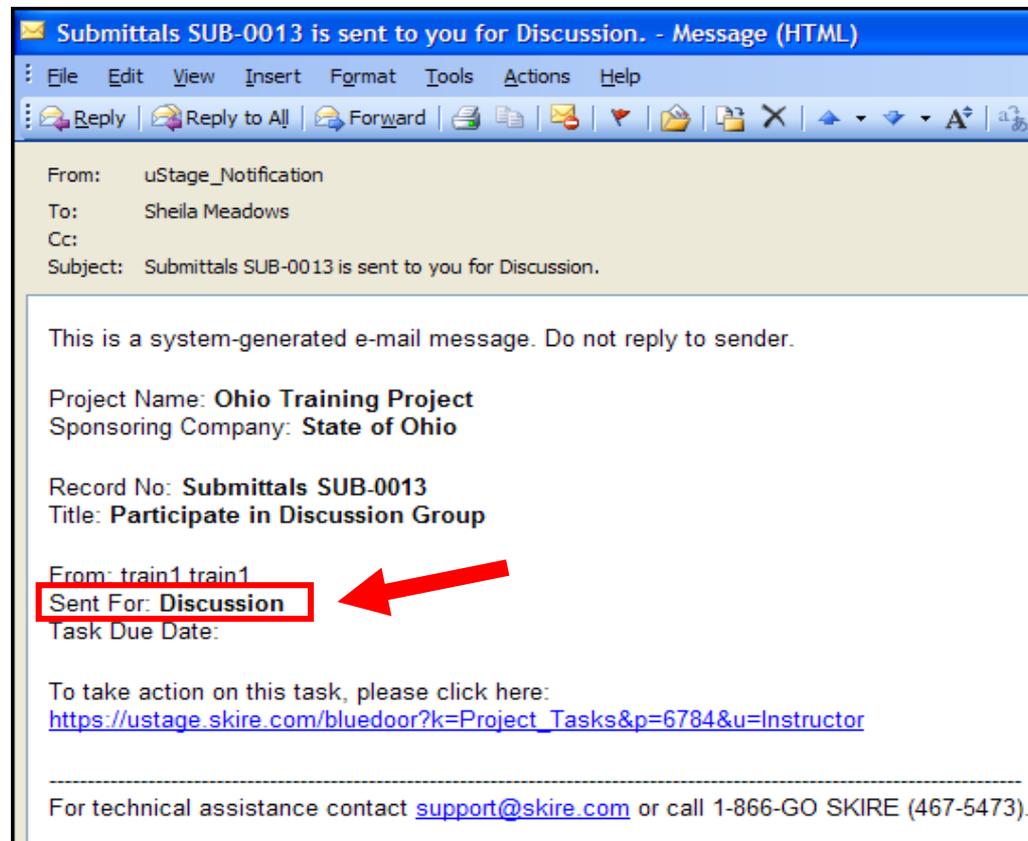
# Task Sent for Discussion

The screenshot shows the Oracle Primavera Unifier interface. The browser address bar indicates the user is proxying for Katie Tuttle. The left sidebar contains navigation options such as Agency General Projects, Alerts, uMail, Collaboration, Tasks, Messages, Drafts, Information, Cost Manager, Data Manager, Document Manager, Logs, and Reports. The main content area displays a table of tasks with the following data:

| Type                               | Number   | Title             | Record Due | From               | Sent for             | Task Due   | Revised    |
|------------------------------------|----------|-------------------|------------|--------------------|----------------------|------------|------------|
| Subcontractor/Supplier Declaration | SSD-0008 | Bob's Concrete    |            | Katie Tuttle, soo  | Discussion           | 09/25/2015 | 09/25/2015 |
| Subcontractor/Supplier Declaration | SSD-0006 | Bob's Concrete    |            | Sara Freetage, soo | Declaration Approval | 09/17/2015 | 09/17/2015 |
| Change Order                       | CO-0008  | shauna test 3/201 |            | Shauna Hooks, soo  | AE Review            |            | 05/20/2015 |

# Email Notification

- ▶ Note: When users respond to a discussion group, the discussion group owner is notified by email



# Participate in a Discussion Group

- ▶ Navigate to:
  - ▶ Collaboration -> Tasks
  - ▶ Select the Discussion Group business process
  - ▶ Click Open

The screenshot shows the Oracle Primavera Unifier web interface. The top navigation bar includes the Oracle logo, 'PRIMAVERA Unifier', and user information 'Proxy for Katie Tuttle'. The breadcrumb trail is 'Agency > OAKS CI Adm... > Agency Genera...'. The left sidebar contains a navigation menu with 'Collaboration' and 'Tasks' highlighted in red. The main content area displays a 'Tasks' table with 3 items. The first row is highlighted in red, and a red arrow points to the 'Open' button in the table's toolbar.

| Type                               | Number   | Title             | Record Due | From               | Sent for       | Task Due   | Re  |
|------------------------------------|----------|-------------------|------------|--------------------|----------------|------------|-----|
| Subcontractor/Supplier Declaration | SSD-0008 | Bob's Concrete    |            | Katie Tuttle, soo  | Discussion     | 09/25/2015 | 09/ |
| Subcontractor/Supplier Declaration | SSD-0006 | Bob's Concrete    |            | Sara Freetage, soo | Declaration Ap | 09/17/2015 | 09/ |
| Change Order                       | CO-0008  | shauna test 3/201 |            | Shauna Hooks, soo  | AE Review      |            | 05/ |

# Participate in a Discussion Group

- ▶ Participants can view all attached files by clicking on them
- ▶ Do not place comments on individual files, these are difficult to retrieve and track
- ▶ To submit comments, click General Comments and attach a comments log

The screenshot shows a web browser window displaying a 'Subcontractor/Supplier Declaration' form. The form is titled 'Subcontractor/Supplier Declaration - Bob's Concrete - Project No. OCI-080001 - Google Chrome'. The URL is [https://ohio-unifier.oracleindustry.com/bp/process/task/open?task\\_id=912711&parent\\_id=584&viewOnly=2&project\\_id=](https://ohio-unifier.oracleindustry.com/bp/process/task/open?task_id=912711&parent_id=584&viewOnly=2&project_id=). The form is divided into three main sections: 'General', 'Declaration Information', and 'Task Details'. The 'General' section contains fields for Organization (Department of Administrative Services), Project Number (OCI-080001), Project Name (Agency General Projects Test), Project Location (OAKS CI Administration), Title (Bob's Concrete), Record Number (SSD-0008), Creation Date (09/14/2015 01:48 PM (UTC-5)), Creator (Katie Tuttle), Status (Pending), and Contractor Name (OCI Test General). The 'Declaration Information' section contains fields for Type (Subcontractor), Subcontractor/Supplier (Bob's Concrete), Federal Tax ID (31-0001), and Primary Officer 1 (Bob Brown). The 'Task Details' section shows 'From: Katie Tuttle', 'To: Moenique Morris', and 'Sent For: Discussion'. A red box highlights the 'General Comments' link at the bottom, with an arrow pointing to a text area for discussion notes. The text area contains the text 'This is a test discussion'.

Organization: Department of Administrative Services  
Project Number: OCI-080001  
Project Name: Agency General Projects Test  
Project Location: OAKS CI Administration  
Title: Bob's Concrete  
Record Number: SSD-0008  
Creation Date: 09/14/2015 01:48 PM (UTC-5)  
Creator: Katie Tuttle  
Status: Pending  
Contractor Name: OCI Test General

Professional Services Agreement Name: test

Declaration Information

Type: Subcontractor  
Subcontractor/Supplier: Bob's Concrete  
Federal Tax ID: 31-0001  
Primary Officer 1: Bob Brown

Task Details

From: Katie Tuttle  
To: Moenique Morris  
Sent For: Discussion

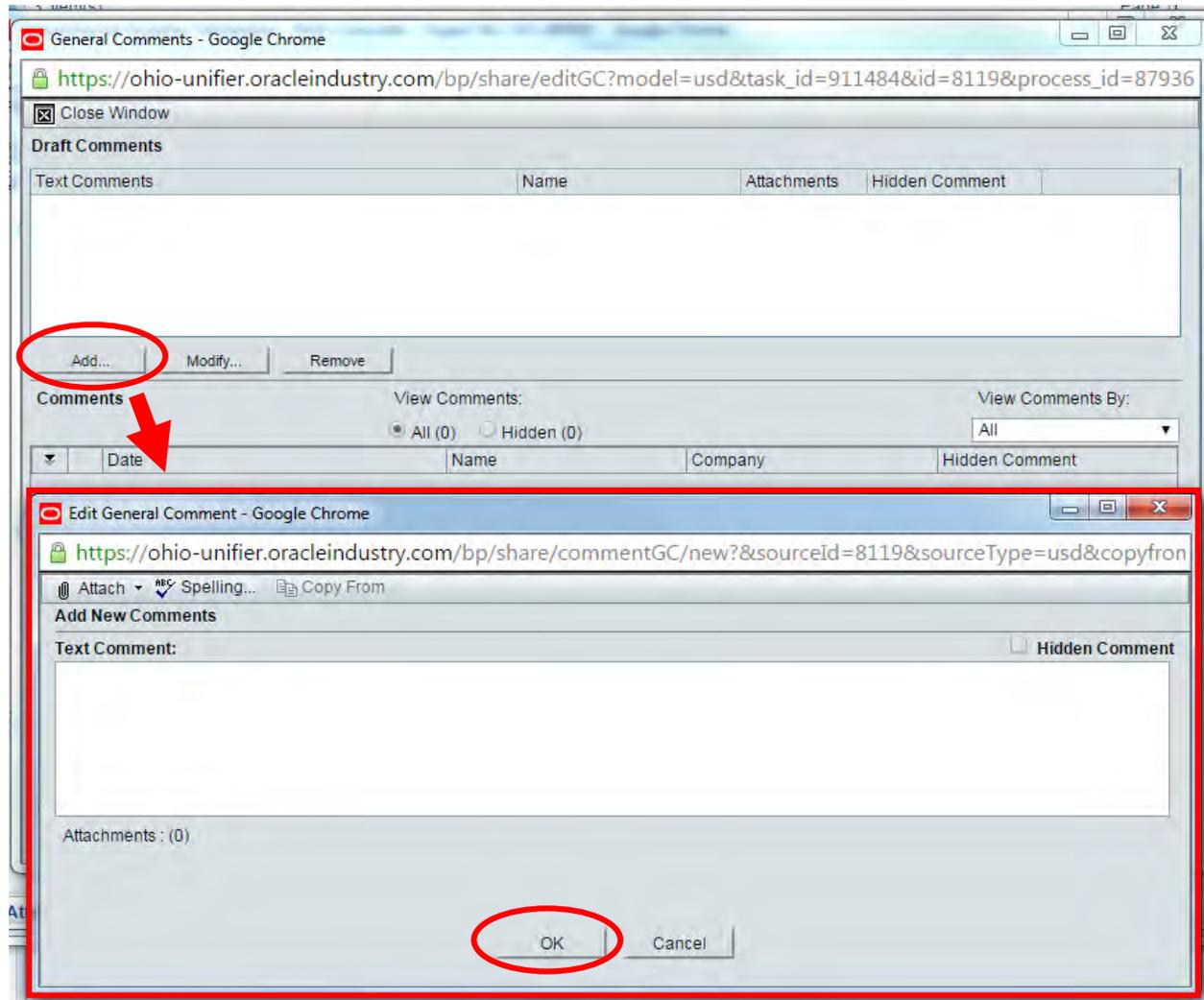
Discussion Notes

This is a test discussion

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

# Add Comments / Attachments

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



# Add Comments / Attachments

- ▶ Note: In order to attach documents, you must first upload them into Document Manager
- ▶ For assistance please refer to the Document Manager Job Aid

# 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: Discussion groups are closed automatically when the Task in which the discussion group had been initiated is completed, regardless of the status of the discussion group comments.

# 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

# Managing Comments

- ▶ At this point, the PM can review comments and attachments, add additional comments, and remove comments and attachments
- ▶ Notes:
  - ▶ If you entered the comment you can modify or remove it
  - ▶ If others entered the comment you cannot modify but you can remove it
  - ▶ If you open an attachment you can edit but you must do a “save as” and import the new file back into Document Manager and attach it as a new comment, even if you created the original file and comment

# Consolidating Comments

- ▶ Comments received in a Discussion Group can be consolidated into a single comment
- ▶ All attachments to comments will display as attachments to the consolidated comment
- ▶ Consolidated comment logs can be made into documents that are attached directly to the business process form

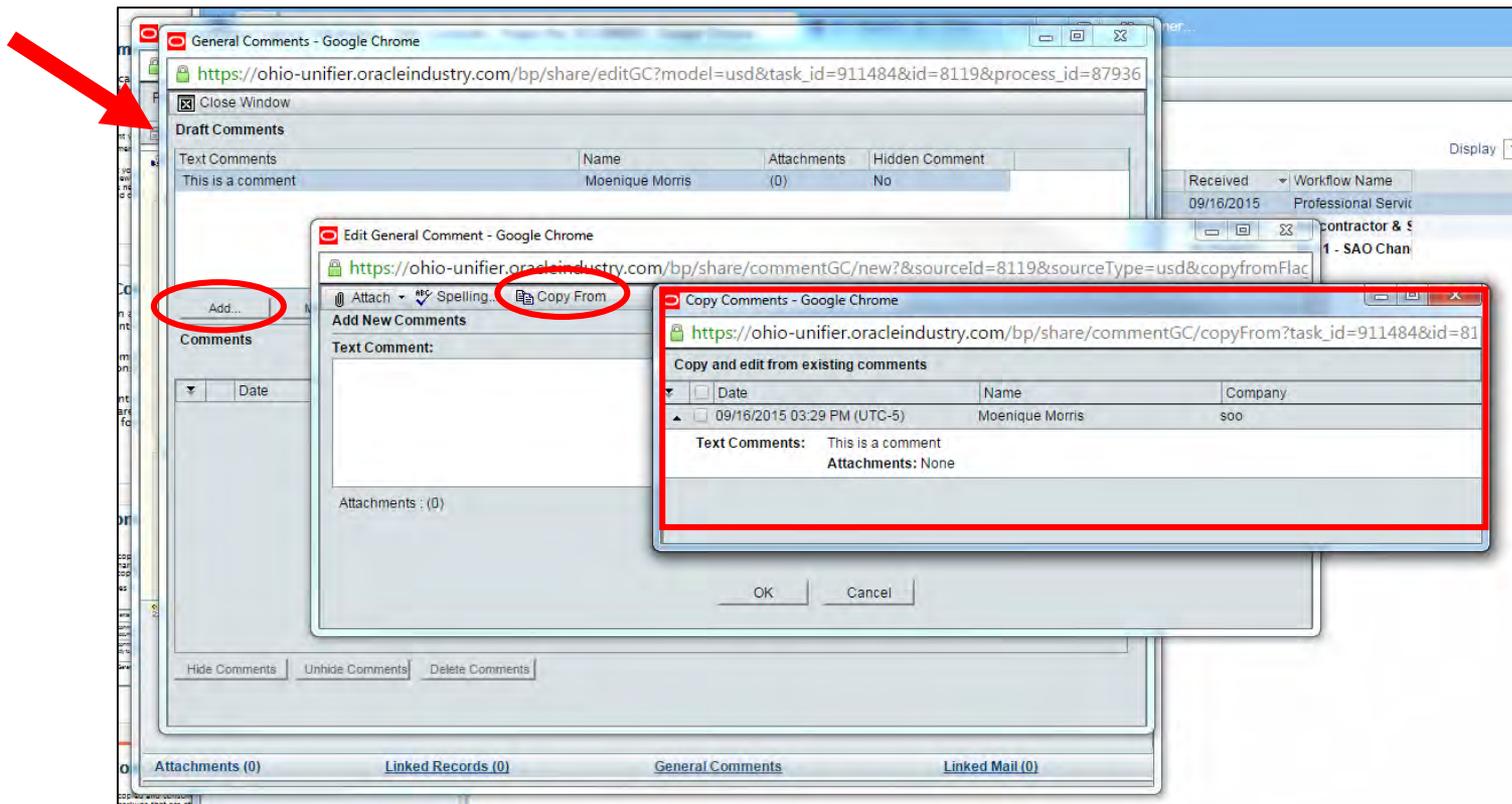
# Copying and Consolidating Comments

- ▶ Note: Text comments can be copied and consolidated in General Comments. Graphic markups that are attached to a General Comment cannot be copied or consolidated.
- ▶ The following table summarizes copying and consolidating documents:

| BP Feature                              | Consolidate Text Comments   | Consolidate Graphic Markups  |
|---|---|--|
| Documents attached to Document-Type BPs | Can copy and consolidate comments made directly to attached documents                                 | Can copy and consolidate graphic markups on attached documents                                       |
| File Attachments all BP types           | Can copy and consolidate comments made to files attached directly to BPs (listed in Attachments link) | Can copy and consolidate markups made to files attached directly to BPs (listed in Attachments link) |
| General Comments                        | Can copy and consolidate General Comments   | Cannot copy or consolidate markups on files attached to a General Comment                            |

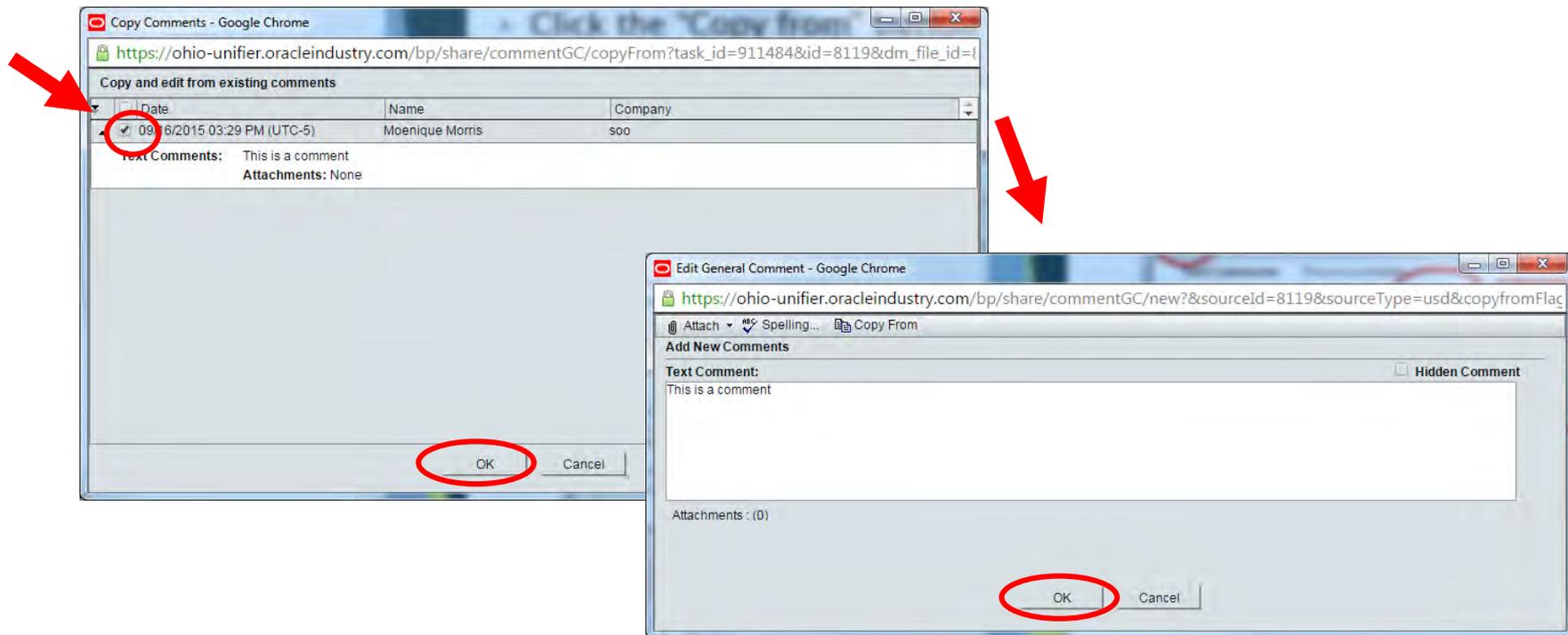
# Copy General Comments

- ▶ Click the General Comments link
- ▶ Click Add (or Modify)
- ▶ Click the “Copy from” button
- ▶ The Copy General Comments window opens, displaying the list of existing comments



# Copy General Comments

- ▶ Click the selection box next to each of the comments you want to copy into your comments and click OK
- ▶ Any additional file attachments or markups associated with each comment are also copied to the new comment
- ▶ Make edits as necessary then click OK



# Copy General Comments

- ▶ Your final screen with the copied comment will display like the one here:

The screenshot shows a web browser window titled "General Comments - Google Chrome". The address bar contains the URL: [https://ohio-unifier.oracleindustry.com/bp/share/editGC?model=usd&task\\_id=911484&id=8119&process\\_ic](https://ohio-unifier.oracleindustry.com/bp/share/editGC?model=usd&task_id=911484&id=8119&process_ic). The page has a "Close Window" button in the top left corner.

**Draft Comments**

| Text Comments     | Name            | Attachments | Hidden Comment |
|-------------------|-----------------|-------------|----------------|
| This is a comment | Moenique Morris | (0)         | No             |
| This is a comment | Moenique Morris | (0)         | No             |

Below the draft comments table are three buttons: "Add...", "Modify...", and "Remove".

**Comments**

View Comments:  All (0)  Hidden (0)  View Comments B

| Date | Name | Company | Hidden Comment |
|------|------|---------|----------------|
|------|------|---------|----------------|

# 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:

[oaksci@ofcc.ohio.gov](mailto:oaksci@ofcc.ohio.gov)

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