



Discussion Groups

K-12 Cloud

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



Participate in Discussion Group

Initiate a Discussion Group

- ▶ Open a record and click the Discussion button

Design Reviews K12 - Project No. OCI-140363.01 - Google Chrome

https://ohio-stage-unifier.oracleindustry.com/.../process/task/open?task_id=152675&parent_id=0&viewOnly=0&project

File Edit View Actions Help Workflow Actions -Select-

Send Save Spelling... Discussion Close Window

General Design Reviews K12

General

Project Number: OCI-140363.01 Record Number: DR-001
Project Name: Talawanda- Kramer Elementary Creator: Katie Tuttle
Organization Name: Talawanda CSD Creation Date: 04/15/2016 09:54 AM (UTC-8)
Facility Name: Kramer Elementary (Talawanda) Status: Pending

Action Details

(Click here to view latest content)

To...
Cc...
Send For:

Design Reviews

Attachment Index : (2) Current View: All Display Attachments with Comments by: All

New Rename Move Delete 2 Item(s) Page 1 of 1 Display 100 Items Per Page

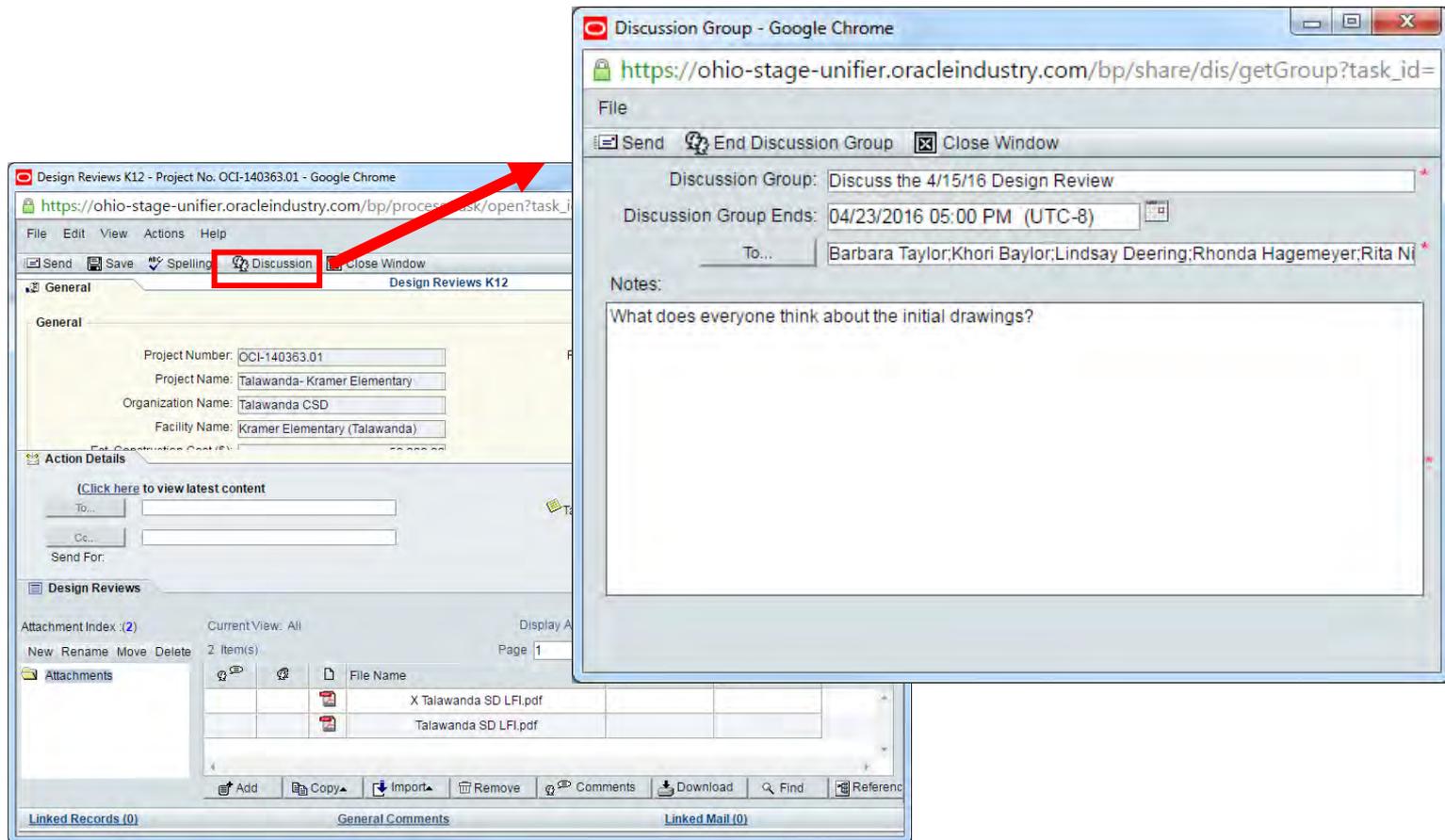
File Name	Type	Status
X Talawanda SD LFI.pdf		
Talawanda SD LFI.pdf		

Add Copy Import Remove Comments Download Find Reference

Linked Records (0) General Comments 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



Discussion Group

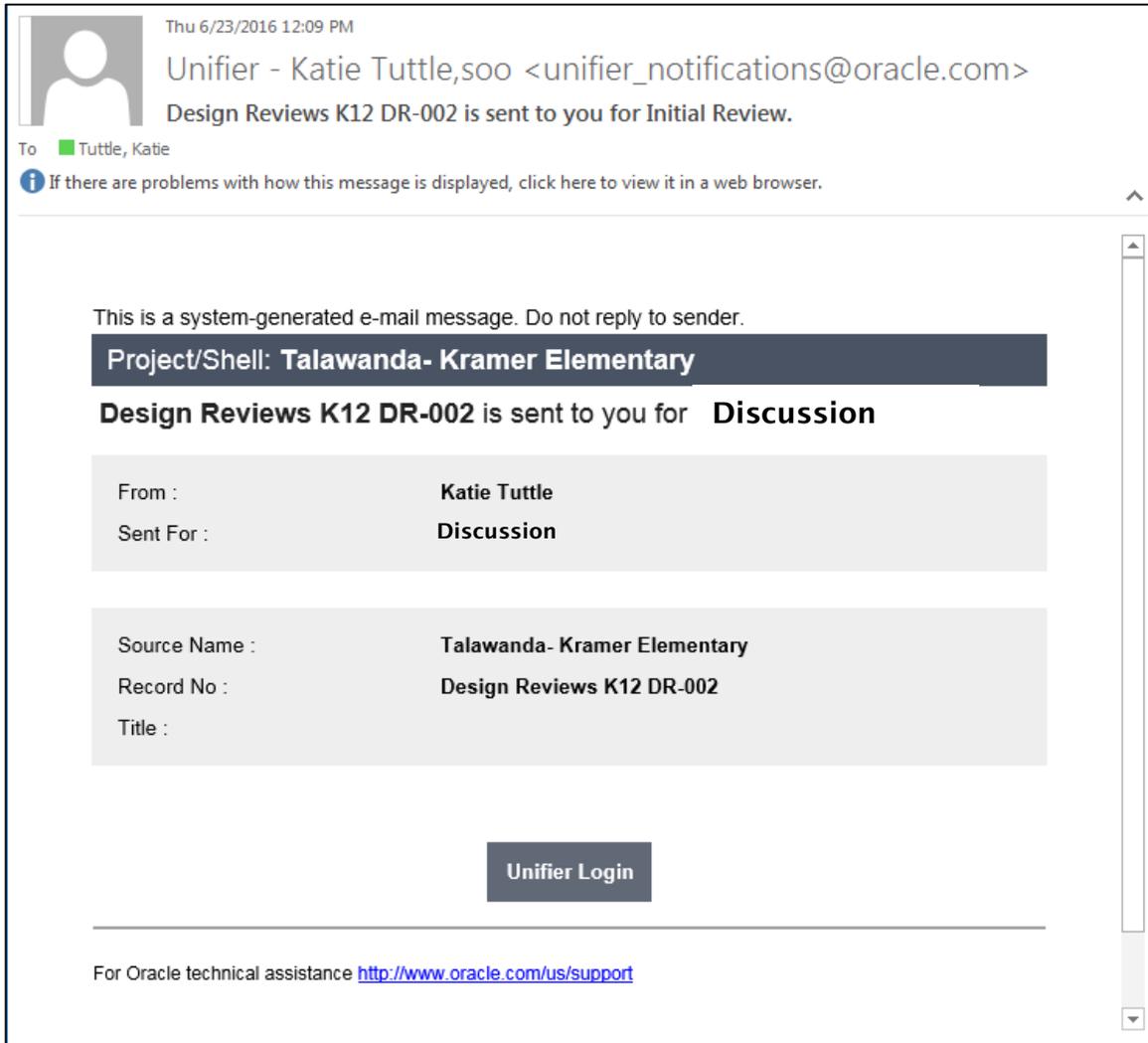
- ▶ Note: When a discussion group is initiated, ownership of the Task remains with the initiator (in this case, the PM)
- ▶ Discussion group members may enter General Comments but they cannot initiate workflow actions or close the discussion group.

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

Email Notification

- ▶ Note: When users are asked to participate in a discussion group, they will receive a task email.



Thu 6/23/2016 12:09 PM

 Unifier - Katie Tuttle,soo <unifier_notifications@oracle.com>
Design Reviews K12 DR-002 is sent to you for Initial Review.

To 

 If there are problems with how this message is displayed, click here to view it in a web browser.

This is a system-generated e-mail message. Do not reply to sender.

Project/Shell: Talawanda- Kramer Elementary

Design Reviews K12 DR-002 is sent to you for Discussion

From : Katie Tuttle
Sent For : Discussion

Source Name : Talawanda- Kramer Elementary
Record No : Design Reviews K12 DR-002
Title :

[Unifier Login](#)

For Oracle technical assistance <http://www.oracle.com/us/support>

Participate in a Discussion Group

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

The screenshot shows the Oracle Primavera Unifier interface. The top navigation bar includes the Oracle logo, 'PRIMAVERA Unifier', and the user name 'Katie Tuttle'. The breadcrumb trail is 'Home > Talawanda- Kra... > Brown - New K-...'. The left sidebar contains a navigation menu with 'Tasks' selected. The main content area displays a table of tasks with the following columns: Type, Number, Title, Re Du, From, Sent for, Task Due, Received, and Workflow Name. The first row, 'Design Reviews K12' with ID 'DR-002', is highlighted in blue and enclosed in a red box. A red arrow points to the 'Design Review' workflow name in this row.

Type	Number	Title	Re Du	From	Sent for	Task Due	Received	Workflow Name
Design Reviews K12	DR-002			Katie Tuttle,soc	Initial Review		06/23/2016	Design Review
Request for Interpretation K12	RFI-0001	RFI Tes		Katie Tuttle,so	Response Acceptance		06/22/2016	Requests for Inter
Submittals K12	SUB-0001	Test Su		Katie Tuttle,so	AE Review	07/06/2016	06/22/2016	Submittals v1.1
Miscellaneous Commit K12	MC-0003	Misc. C		Katie Tuttle,so	Funding Certification		05/06/2016	Miscellaneous Co
Miscellaneous Invoice K12	MI-0001	Test Inv		Katie Tuttle,soc	Payment Processing		05/06/2016	Miscellaneous Invc
Miscellaneous Commit K12	MC-0002	Misc. C		Katie Tuttle,soc	Funding Certification		05/04/2016	Miscellaneous Cor
Design Reviews K12	DR-001			Katie Tuttle,soc	Detailed Review		04/15/2016	Design Reviews
Subcontractor/Supplier Declarations	SMSD-003	OAKS C		Katie Tuttle,soc	Subcontract Attachment		04/12/2016	Subcontractor & Su
Contract K12	CON-001	Katie's		Katie Tuttle,soc	School District Contract E		04/07/2016	Best Value Selectio
Contract Modification K12	CM-0003	Test dis		Katie Tuttle,soc	Contractor Review		04/01/2016	V2.0 - GMP Subco

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 displays a web browser window with the URL: https://ohio-unifier.oracleindustry.com/bp/process/task/open?task_id=912711&parent_id=584&viewOnly=2&project_id=

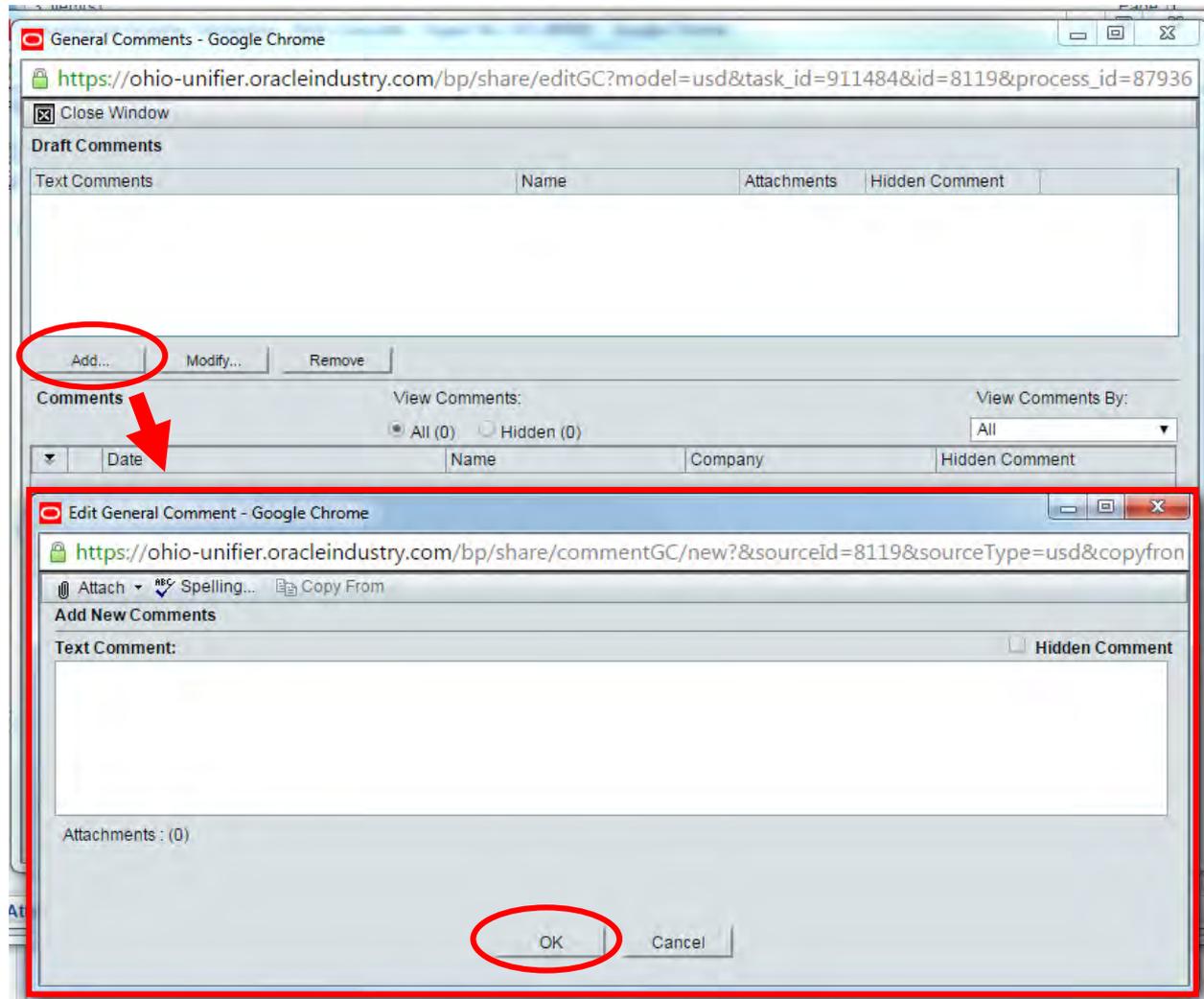
The page title is "Subcontractor/Supplier Declaration". The main content area is divided into sections:

- General**: 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).
- Declaration Information**: Contains fields for Type (Subcontractor), Subcontractor/Supplier (Bob's Concrete), Federal Tax ID (31-0001), and Primary Officer 1 (Bob Brown).
- Task Details**: Shows "From: Katie Tuttle" and "To: Moenique Morris".

A red box highlights the "General Comments" link at the bottom of the page, with an arrow pointing to a text area labeled "Discussion Notes" containing the text "This is a test discussion".

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: 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

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

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