



Discussion Groups

K-12 Cloud

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

Design Reviews K12 - Project No. SFC-080001.01 - Mozilla Firefox

https://ohio-dev-unifier.oracleindustry.com/bp/process/task/open?task_id=187110&parent_id=0&viewOnly=0&project_id=10

File Edit View Actions Help

Workflow Actions -Select- Send Save Spelling... **Discussion** Review Close Window

General Design Reviews K12

General

Project Number: SFC-080001.01 Record Number: DR-002

Project Name: Oak Hills Local Building Project Creator: Katie Tuttle

Organization Name: Creation Date: 06/23/2017 12:30 PM (UTC-8)

Facility Name: Status: Pending

Action Details

(Click here to view latest content)

To...
Cc...
Send For:

Task Notes:
Workflow Progress

Standard

Attachment Index :(12) Current View: All Display Attachments with Co

New Rename Move Delete 12 Item(s) Page 1 of 1

Attachments	File Name	Type	Status
	Carey LEED Scorecard 10.18.2013.pdf		
	Cooling Load.pdf		
	FS_3nm.inn		

Add Copy Import Remove Comments Download

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

The screenshot shows a web application interface for 'Design Reviews K12 - Project No. SFC-080001.01'. The 'Discussion' button is highlighted with a red box, and a red arrow points to the 'Discussion Group' dialog box. The dialog box is titled 'Discussion Group - Google Chrome' and 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;Khorri Baylor;Lindsay Deering;Rhonda Hagemeyer;Rita Ni
- Notes: What does everyone think about the initial drawings?

The main application interface shows the 'General' tab with the following information:

- Project Number: SFC-080001.01
- Project Name: Oak Hills Local Building Project
- Organization Name: [Empty]
- Facility Name: [Empty]

The 'Attachments' section shows a list of files:

File Name	Type	Status
Carey LEED Scorecard 10.18.2013.pdf	PDF	
Cooling Load.pdf	PDF	
ES_3pm.inn	Image	

Discussion Group Notes

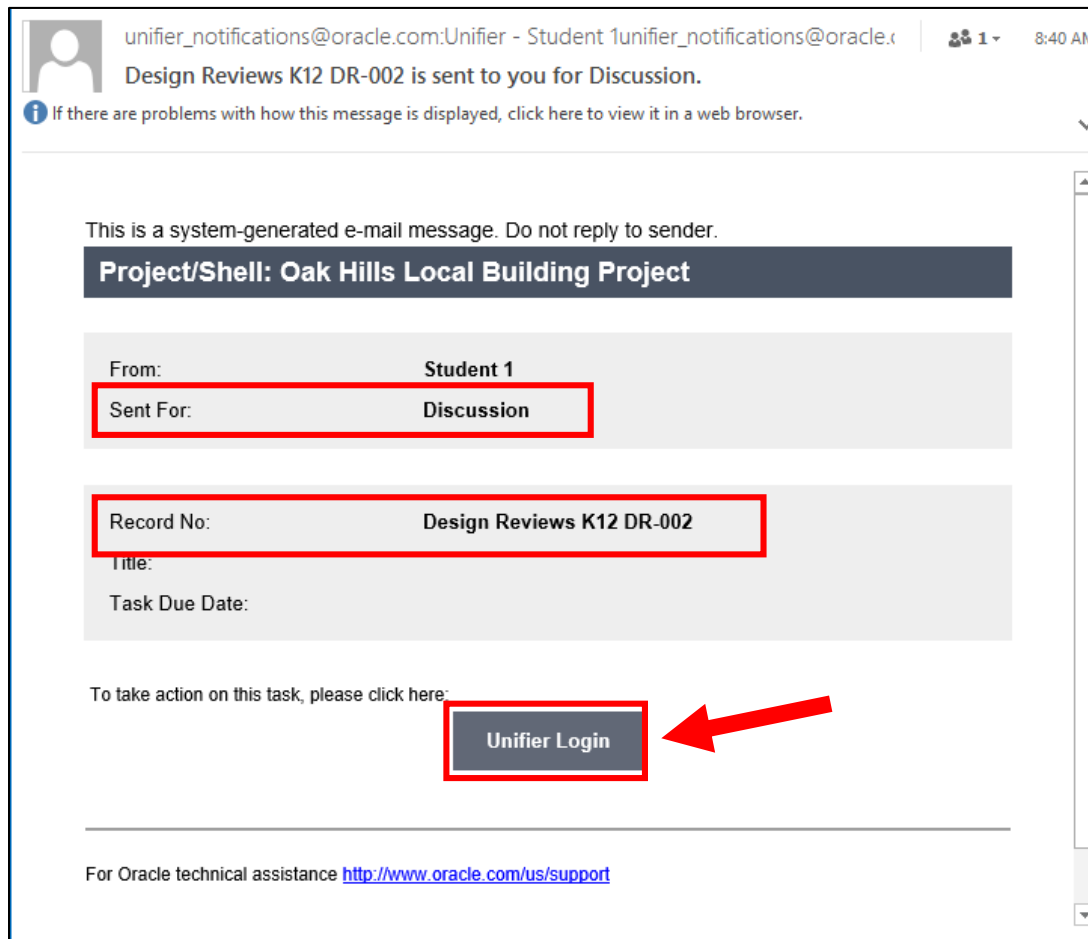
- ▶ When a discussion group is initiated, ownership of the Task remains with the initiator (in this case, the PM)
- ▶ Discussion group members may enter General Comments but they cannot initiate workflow actions or close the discussion group.

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 shows the Oracle Primavera Unifier (Development) interface. The top navigation bar includes the Oracle logo, the application name 'PRIMAVERA Unifier (Development)', and the user name 'Katie Tuttle'. The breadcrumb trail indicates the current location: 'School Facilities > OAKS CI District T... > Oak Hills Local B...'. The left sidebar contains various navigation options, with 'Tasks' highlighted. A red arrow points to the 'Tasks' menu item. The main content area displays a 'Tasks' table with columns for 'Origin', 'Business Process', and 'Record Number'. The first row is highlighted with a red box, indicating a task for discussion. The right sidebar shows 'Record Details' for the selected task, including 'General' information such as Project Number, Record Number, Project Name, Creator, Organization Name, Creation Date, Facility Name, Status, Est. Construction Cost, Stage, and Completion Status.

Origin	Business Process	Record Number
Oak Hills Local Buildi...	Design Reviews K...	DR-002
Oak Hills Local Buildi...	Submittals K12	SUB-0007
Oak Hills Local Buildi...	Locally Funded In...	LFI-02
Oak Hills Local Buildi...	Action Items K12	AI-0018
Oak Hills Local Buildi...	Request for Interp...	RFI-03
Oak Hills Local Buildi...	Contract Modificat...	CM-0012
Oak Hills Local Buildi...	Contract Schedul...	SOV-007
Oak Hills Local Buildi...	Miscellaneous Co...	MC-0008
Oak Hills Local Buildi...	Miscellaneous Co	MC-0006

Project Number	Record Number
SFC-080001.01	DR-002
Project Name	Creator
Oak Hills Local Building Project	Katie Tuttle
Organization Name	Creation Date
	06/23/2017 12:30 PM (UTC-8)
Facility Name	Status
	Pending
Est. Construction Cost (\$)	50,000.00
Stage	Completion Status
Program Verification	85 - 95% (CD Only)

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 K12 - Project No. SFC-080001.01 - Google Chrome

Secure | https://ohio-dev-unifier.oracleindustry.com/bp/process/task/open?task_id=187151&parent_id=39&viewOnly=2&project_id=1

File Edit View Actions Help

Accept Task Decline Task Review Close Window

Design Reviews K12

General

General

Project Number: SFC-080001.01 Record Number: DR-002

Project Name: Oak Hills Local Building Project Creator: Katie Tuttle

Organization Name: Creation Date: 06/23/2017 12:30 PM (UTC-8)

Facility Name: Status: Pending

Task Details

From: Student 1 Sent For: Discussion Discussion Notes

To: Steve Mayo; Shauna Hooks; More..

Design Reviews

Attachment Index (12) Current View: All

New Rename Move Delete 12 Item(s) Page 1 of 1

Attachments	File Name	Type	Status
	Carey LEED Scorecard 10.18.2013.pdf		
	Cooling Load.p		

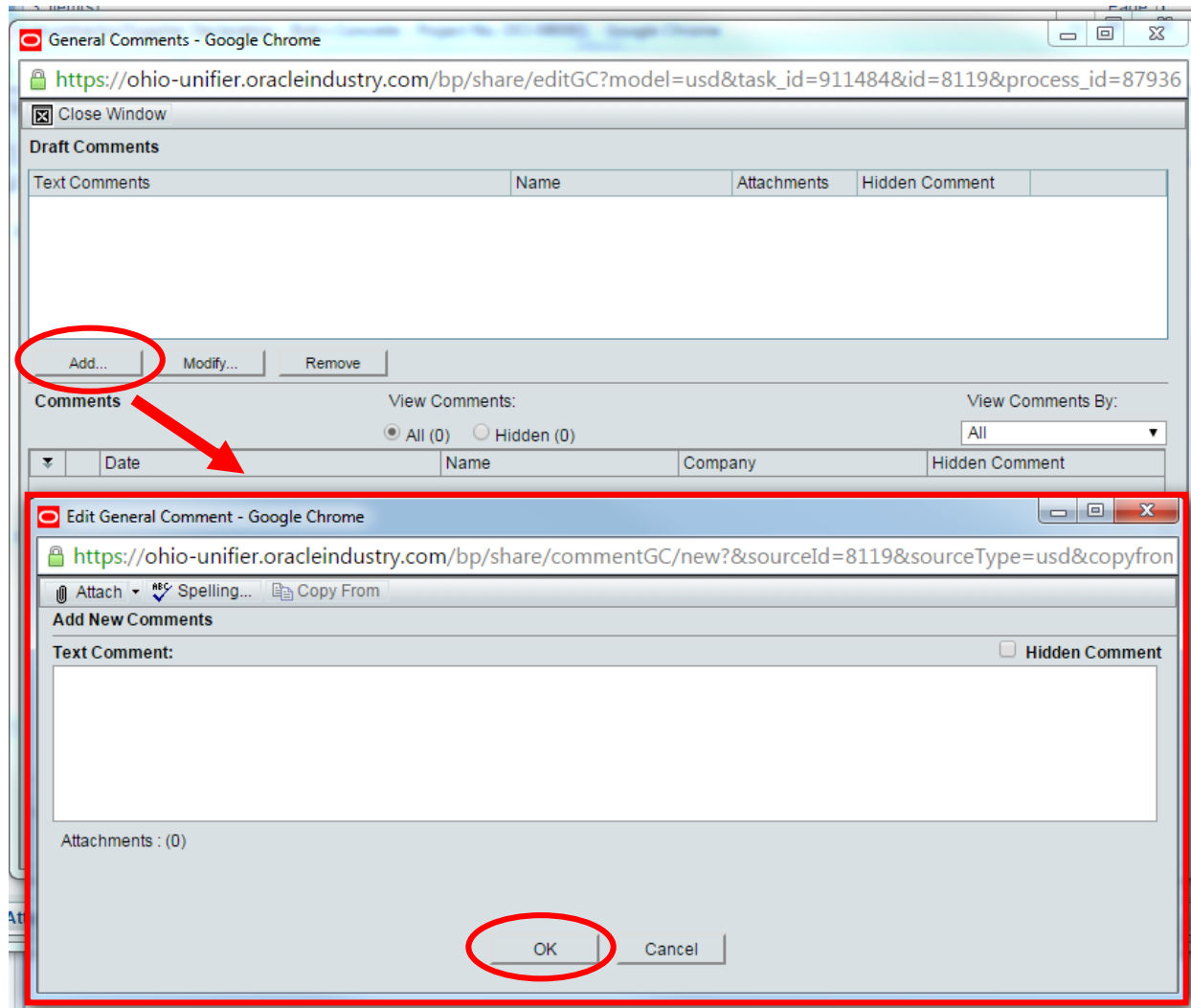
Comments Download Find References

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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