



Discussion Groups

K-12 Legacy

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

- ▶ Open a record and click the Discussion button

Design Reviews - Project No. SFC-140363.01 - Internet Explorer

https://oaksci.osfc.ohio.gov/bp/studio/bp/log/open?srcid=258&model=udr&fromcostlog=1&project_id=1125

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:

Task Notes:

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

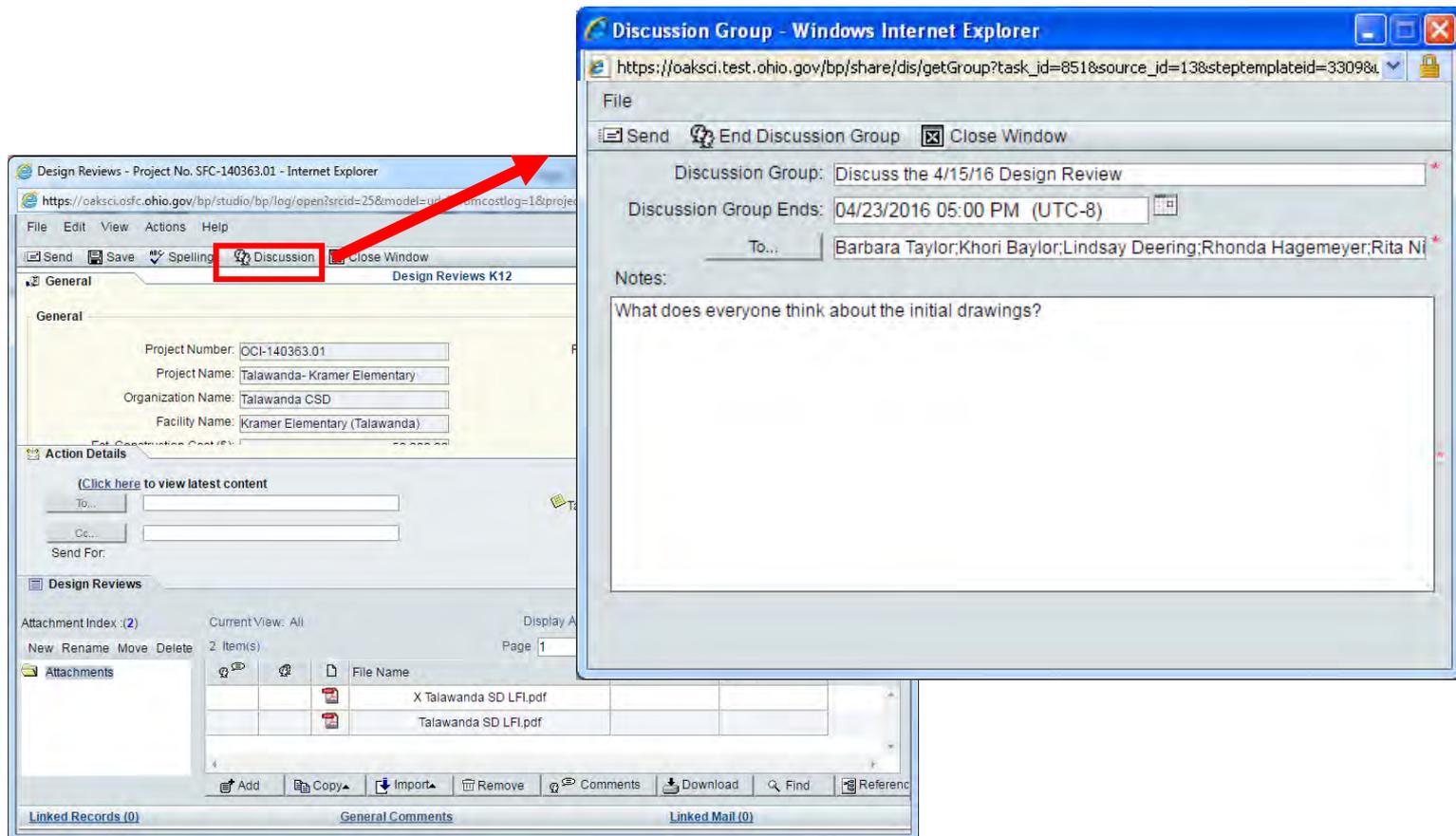
File Name	Type	Status
X Talawanda SD LFI.pdf		
Talawanda SD LFI.pdf		

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

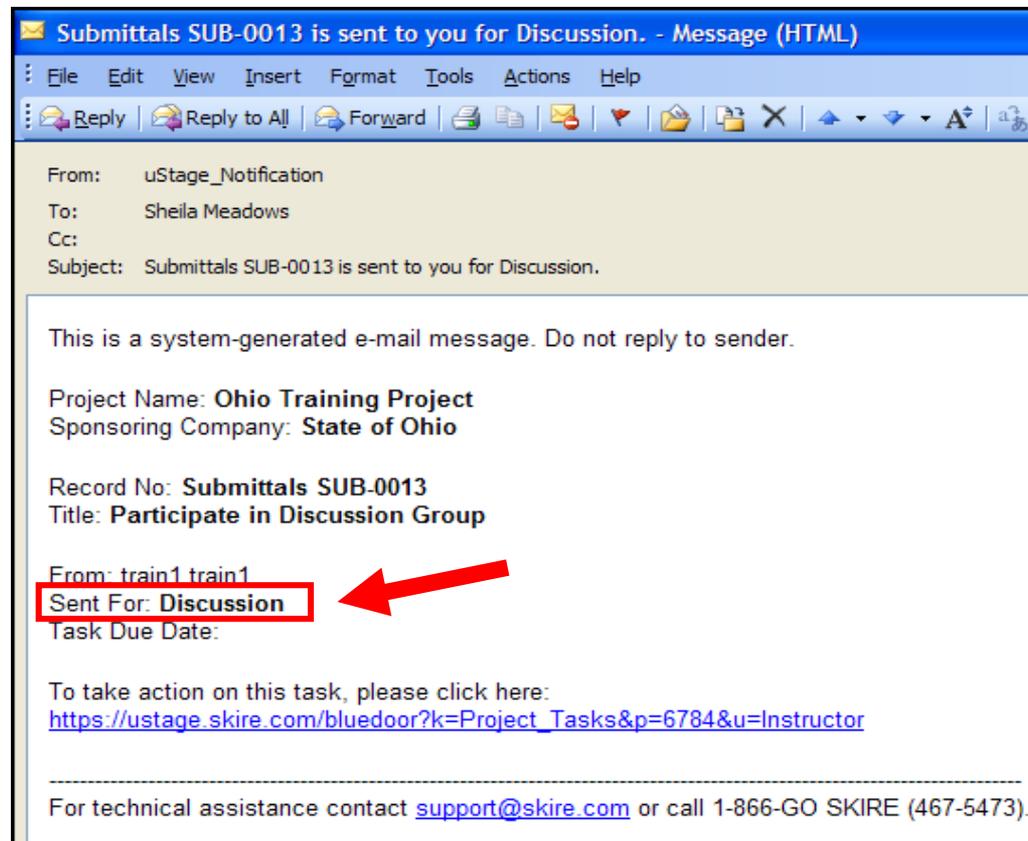
Task Sent for Discussion

The screenshot shows the Primavera Unifier web interface. The browser address bar indicates the user is logged in as Katie Tuttle. The page title is "INITIATE A DISCUSSION". The navigation menu includes "Home", "Company Workspace", and "School Facilities". The current view is "Tasks - Current View: All" with 3 items. A table lists tasks, with the first two rows highlighted in red. A red arrow points to the "Sent for" column of the first row.

Type	Number	Title	Recon Due	From	Sent for	Task Due	Req
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/

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 Primavera Unifier web interface. The browser address bar displays the URL: https://oaksci.osfc.ohio.gov/bp/nav/main/user#t:'us_sf,m:'user',p:1137,k:'project_tasks'. The user is identified as Katie Tuttle. The application shows a navigation menu on the left with 'Tasks' selected. The main content area displays a table of tasks with the following data:

Type	Number	Title	Record Due	From	Sent for	Task Due	Record Due
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

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

Subcontractor/Supplier Declaration - General - Project No. SFC-130336.01 - Internet Explorer

https://oaksci.osfc.ohio.gov/bp/studio/bp/log/open?srcid=2094&model=usd&fromcostlog=1&project_id=1137

File Edit View Actions Help

Accept Task Decline Task 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 01:48 PM (UTC-5)

Project Name: Agency General Projects Test Creator: Katie Tuttle

Project Location: OAKS CI Administration Status: Pending

Title: Bob's Concrete Contractor Name: OCI Test General

Contract Name: 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: 4200 Surface Rd

Task Details

From: Katie Tuttle Sent For: Discussion Discussion Notes

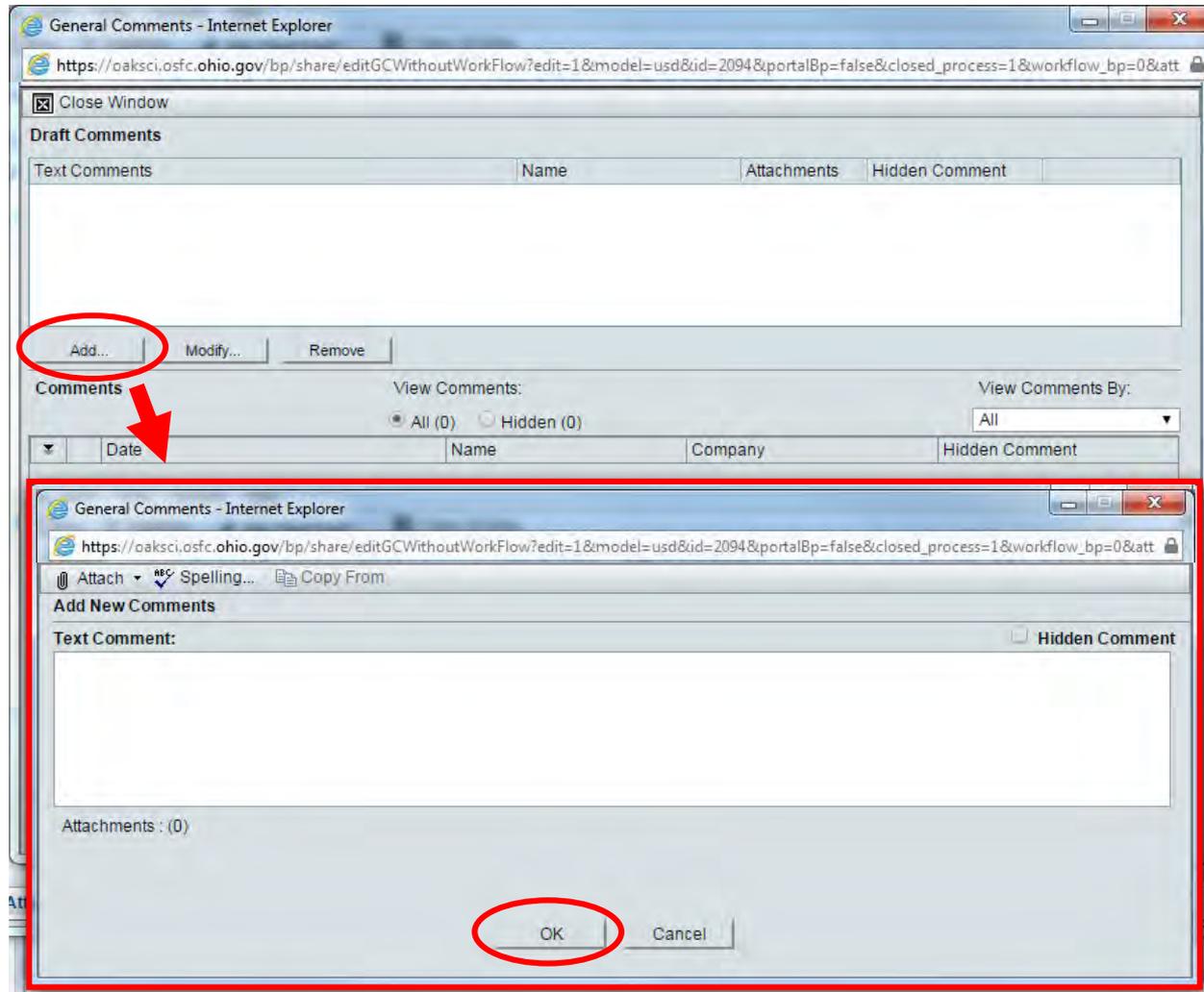
To: Moenique Morris This is a test discussion

Attachments (0) 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: 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

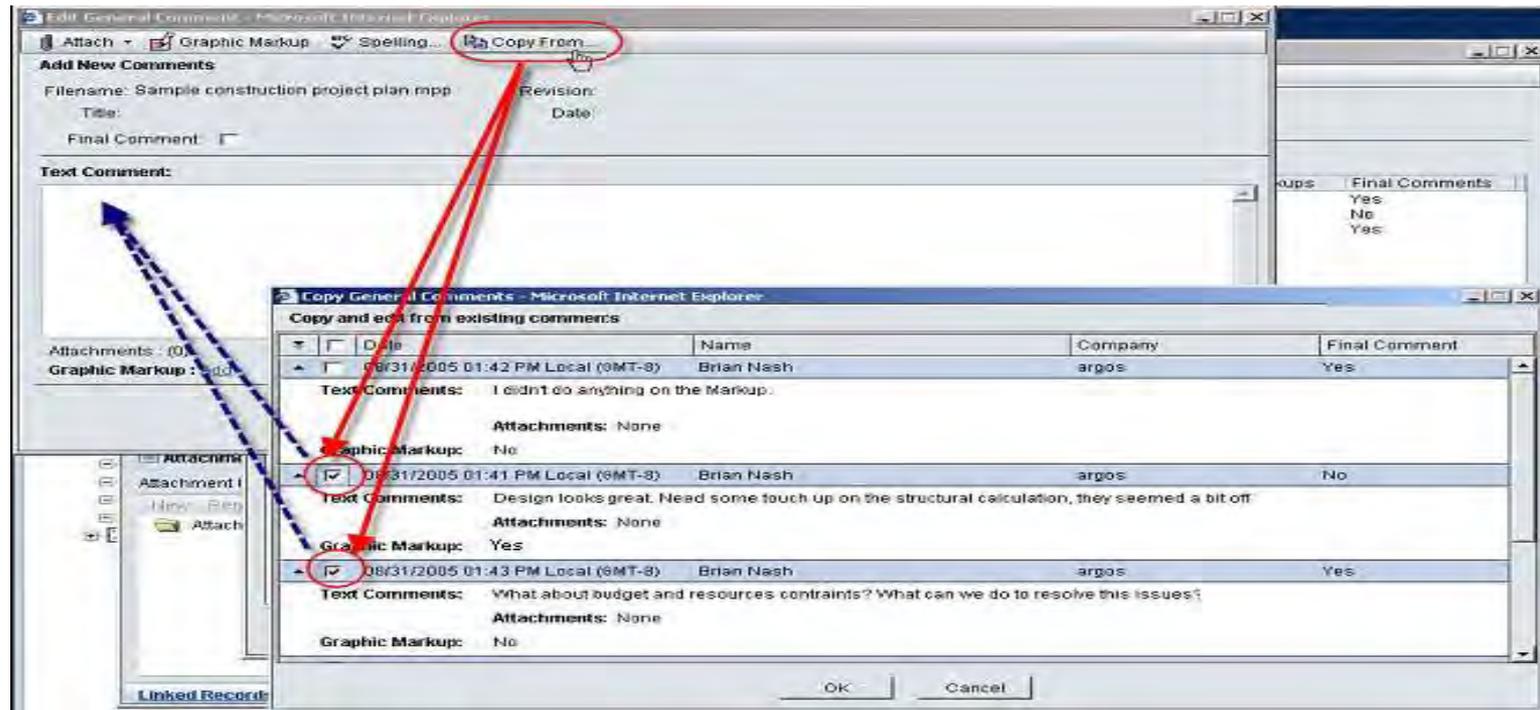
Copying and Consolidating Comments

- ▶ 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

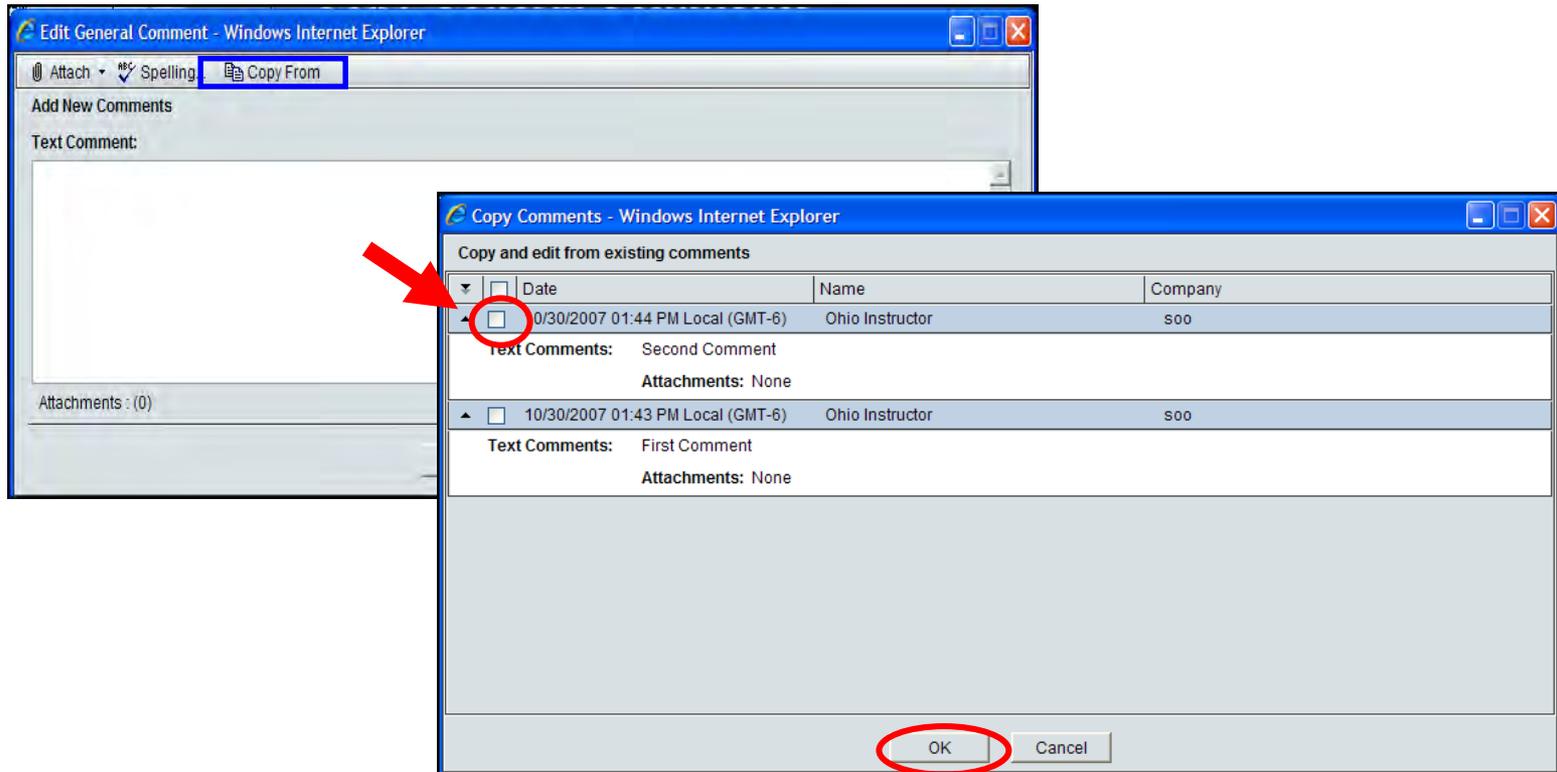
Copy General Comments

- ▶ 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



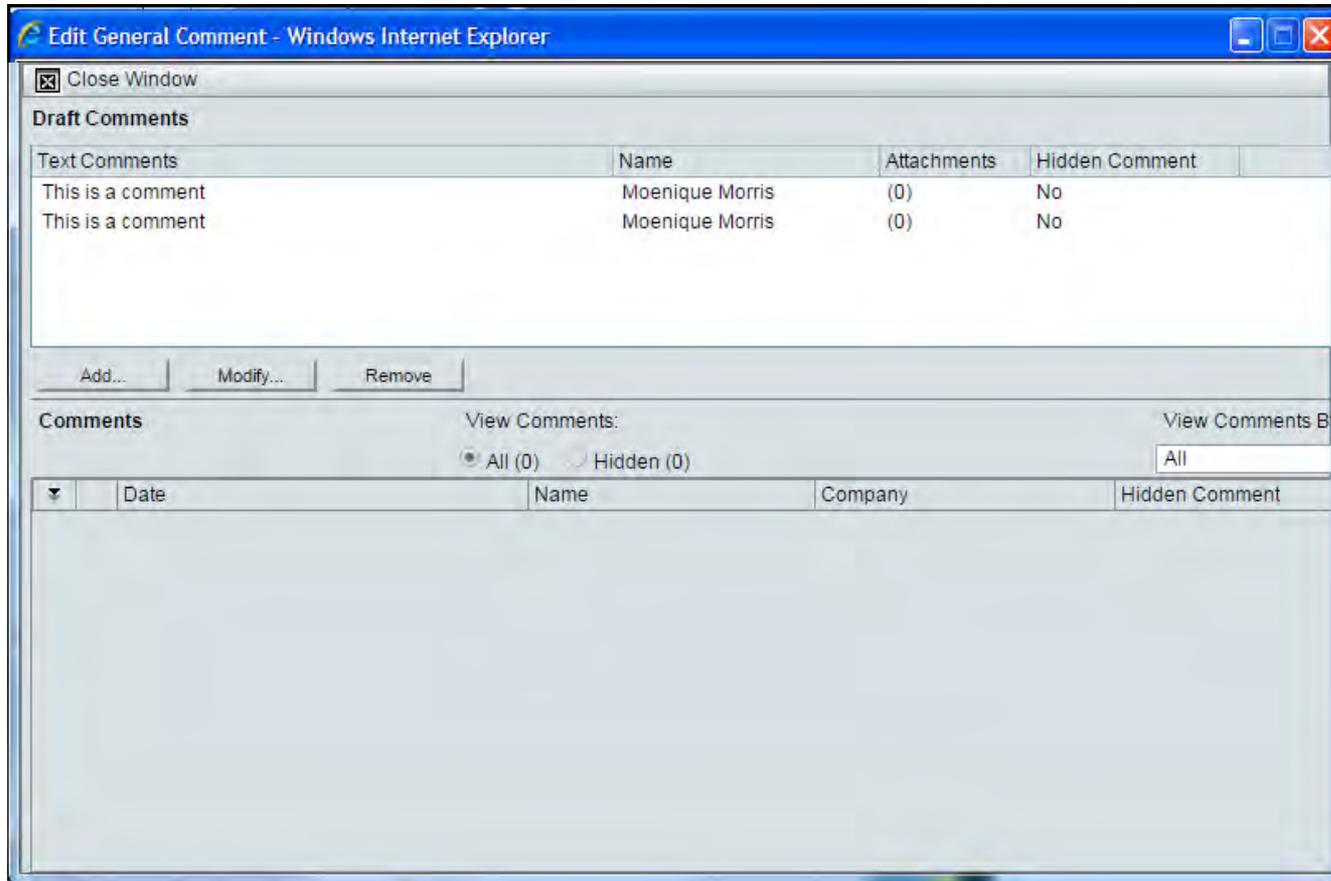
Copy General Comments

- ▶ 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:



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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614.644.2211