



# **WORKING WITH DISCUSSION GROUPS**

# DISCUSSION GROUPS - COLLABORATING WITH TEAM MEMBERS

In selected business processes the task owner can initiate a Discussion Group to solicit input from other project team members

Eligible participants are pulled from the business process *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

## Task owner can:

- Select which, if any, of the comments and/or markups to use in creating 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



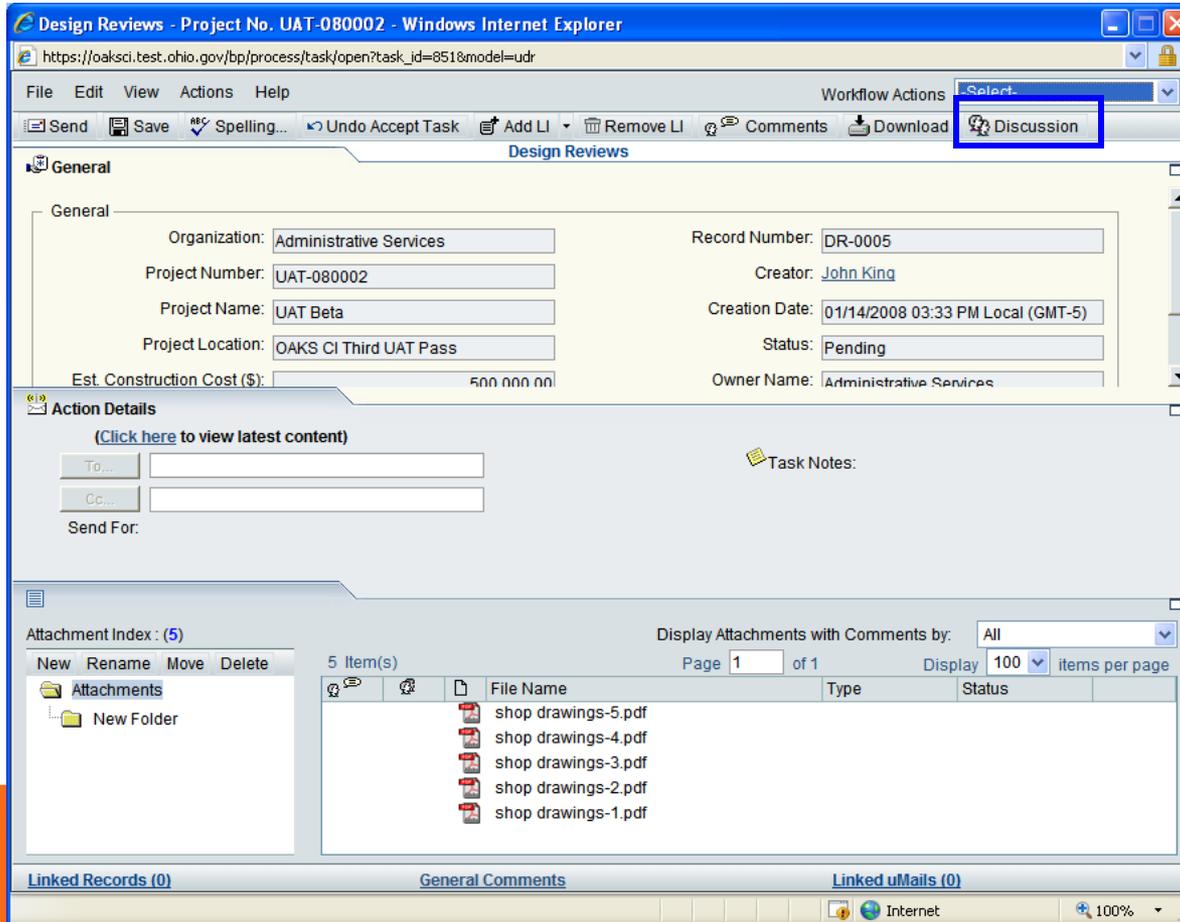
## Initiate a Business Process Discussion Group

- You may **initiate** a Discussion Group to help you draft your comments or markups

## Participate in a Business Process Discussion Group

- You have been requested to **join** (participate) a discussion group by another user who wants input before completing a task

# INITIATE A DISCUSSION GROUP

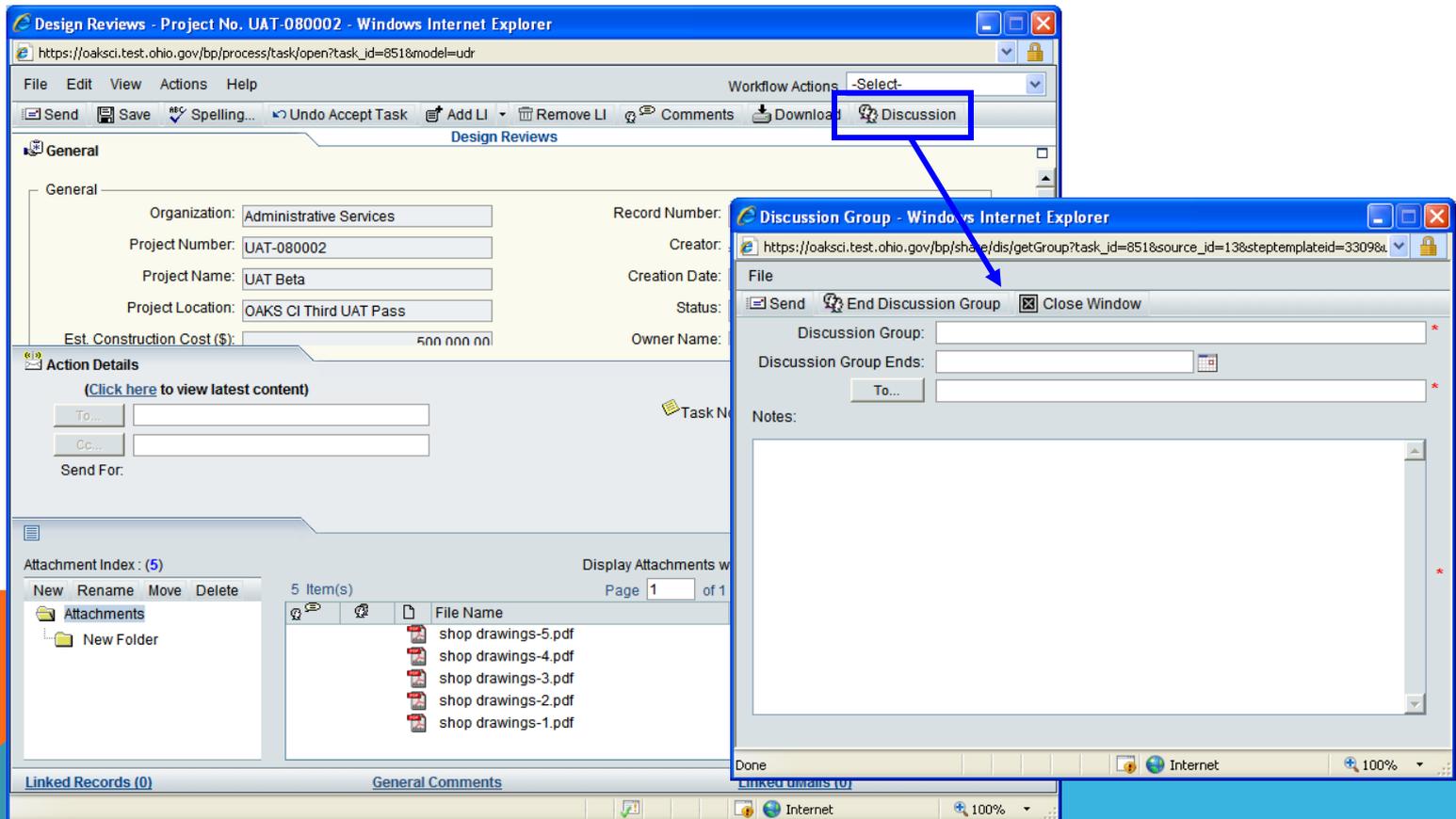


Open a business process record and click the Discussion Group button



# INITIATE A DISCUSSION GROUP

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



# INITIATE A DISCUSSION GROUP

Discussion Group Invitation Window

Discussion Group - Windows Internet Explorer

File

Send End Discussion Group Close Window

Discussion Group: Discussion Group \*

Discussion Group Ends: \*

To... Ohio Instructor, \*

Notes: \*

This is for Ohio Training

Required fields

- The Discussion Group Invitation window opens
- Name the discussion group
- Click To and Choose the user(s) to include in the discussion group
- Notes is a required field

# 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 logs, and you will receive an e-mail 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

Skire Unifier™

08/07/2007 - Ohio Instructor

Ohio.gov

Preferences Support Logout

User Mode

File Edit View Help

New Open Find

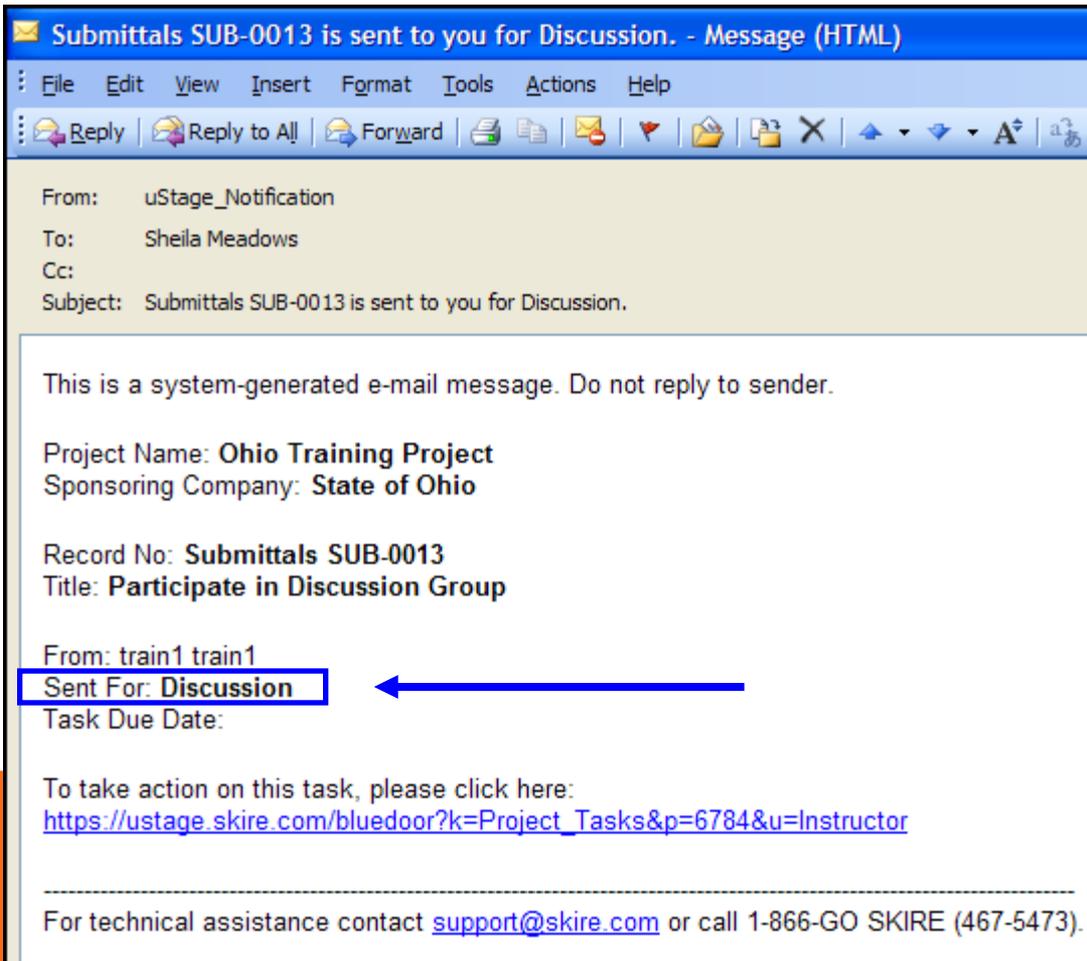
Tasks - Current View: All

9 Item(s) Page 1 of 1 Display 100 items per page

Type	Number	Title	Record Due	From	Sent for	Task Due	Received
Submittals	SUB-0014	Discussion Group	09/04/2007	train1 train1, soo	Discussion	08/08/2007	08/07/2007
Submittals	SUB-0009	Discussion Group2	08/22/2007	Ohio Instructor, s	CM Review		07/25/2007
Submittals	SUB-0008	Discussion Group	08/22/2007	Ohio Instructor, s	CM Review		07/25/2007
Submittals	SUB-0007	Submittal multiple folders	08/21/2007	Ohio Instructor, s	Associate Revi	08/13/2007	07/24/2007
Submittals	SUB-0006	Submittals Training	08/21/2007	Ohio Instructor, s	Associate Revi	08/13/2007	07/24/2007
Submittals	SUB-0005	Submittals 5	08/21/2007	Ohio Instructor, s	Associate Rev	08/13/2007	07/24/2007
Action Items	AI-0003	Training AI 2	07/31/2007*	Ohio Instructor, s	Review		07/24/2007
Submittals	SUB-0004	Training Submittals 4	08/21/2007	Ohio Instructor, s	CM Review		07/24/2007
Submittals	SUB-0003	Training Submittals3	08/21/2007	Ohio Instructor, s	CM Review		07/24/2007



# EMAIL NOTIFICATION



When users respond to a discussion group, the discussion group owner is notified by email



# PARTICIPATE IN A DISCUSSION GROUP

The screenshot shows the Skire Unifier web interface. The top navigation bar includes the Skire Unifier logo, the user name '08/07/2007 - Ohio Instructor', and links for 'Preferences', 'Support', and 'Logout'. The left sidebar contains a tree view of navigation options: Home, Tasks, Messages, Drafts, uMail, Company, Programs, Projects, Ohio Training Project - Hon, Summary, Alerts, uMail, Collaboration, and Tasks. The 'Open' button in the top menu bar and the 'Collaboration' and 'Tasks' items in the sidebar are highlighted with blue boxes. The main content area displays a 'Tasks' log with the following table:

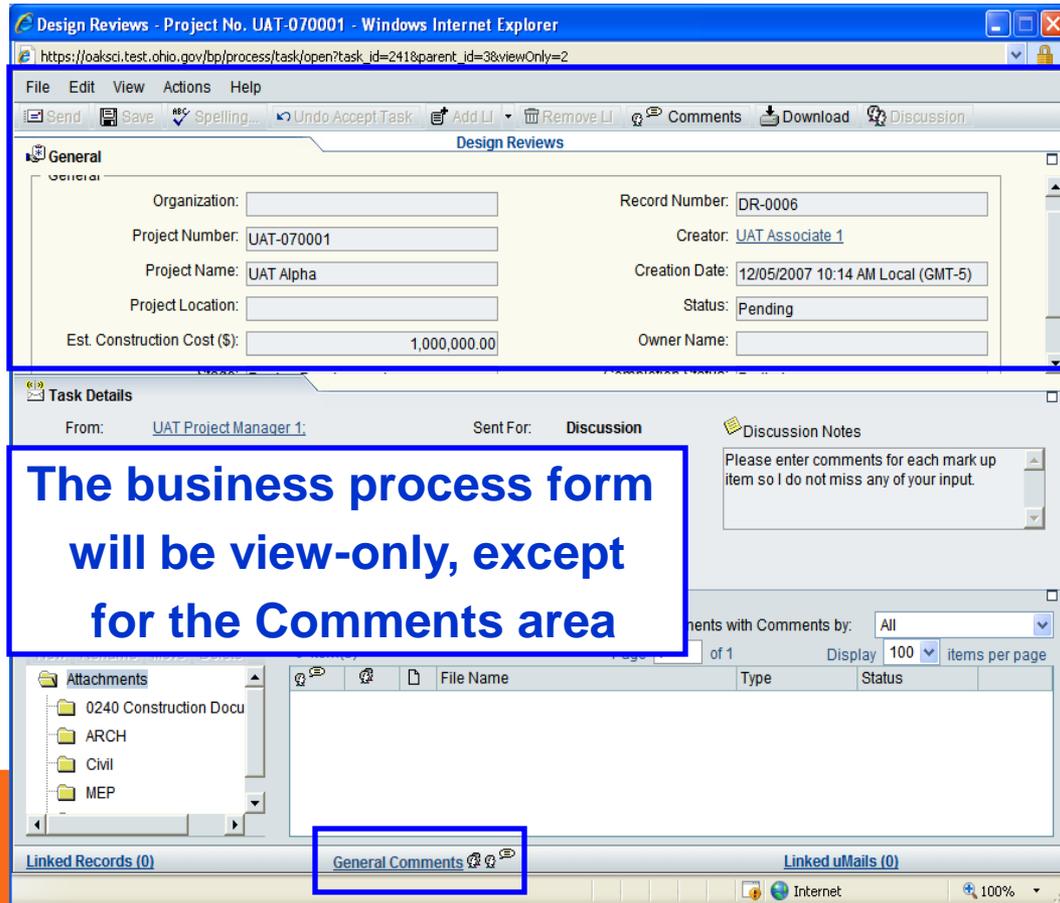
Type	Number	Title	Record Due	From	Sent for	Task Due	Received
Submittals	SUB-0015	Discussion in Ge	09/04/2007	train1 train1, soo	Discussion		08/07/2007

From the Tasks log, select the discussion group business process

Click Open



# PARTICIPATE IN A DISCUSSION GROUP



Participants can view all attached files by clicking on them

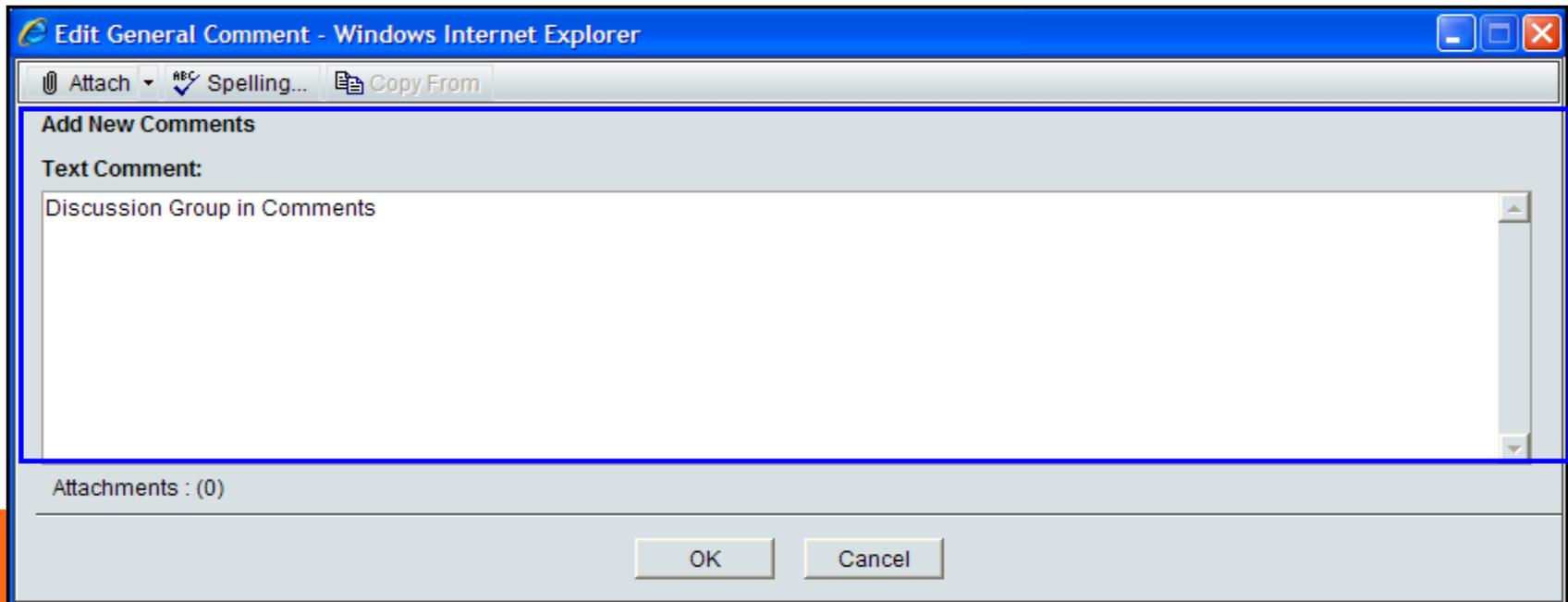
Do not place comments on individual files, these are difficult to retrieve and track

To submit comments Click General Comments and attach a comments log



# ADD COMMENTS TO A DISCUSSION GROUP

Add text comments and/or attachments



The screenshot shows a web browser window titled "Edit General Comment - Windows Internet Explorer". The address bar contains "Attach", "Spelling...", and "Copy From". The main content area is titled "Add New Comments" and features a "Text Comment:" label above a text input field. The input field contains the text "Discussion Group in Comments". Below the input field, it says "Attachments : (0)". At the bottom of the window are "OK" and "Cancel" buttons.

# ADD COMMENTS TO A DISCUSSION GROUP

**Any documents you wish to attach must first be uploaded into Document Manager before you can attach in General Comments**



# CLOSING A DISCUSSION GROUP

When a discussion group is closed, all invited participants will receive an e-mail notification

To close a discussion group:

- The Initiator can close the discussion group 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

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 comment 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. A few hints regarding what Unifier allows:

- If you entered the comment you can modify or remove it
- If others entered the comment you cannot modify it but you can remove it
- If you open an attachment you can edit it but you must do a save as and import the new file back into the Document Manager and attach it as a new comment, even if you created the original file and comment



# MANAGING COMMENTS

Comments received in a discussion group can be consolidated into a single, cohesive comment

The screenshot illustrates the process of consolidating comments. The top window, titled 'Edit General Comment - Microsoft Internet Explorer', shows a form for adding a new comment. The 'Copy From...' button is circled in red. The bottom window, titled 'Copy General Comments - Microsoft Internet Explorer', shows a dialog box with a table of existing comments. The 'Copy From...' button in the dialog box is also circled in red. Red arrows indicate the flow of information from the dialog box to the top window. A blue dashed arrow points from the 'Text Comment' field in the top window to the 'Copy From...' button in the dialog box.

Date	Name	Company	Final Comment
08/31/2005 01:42 PM Local (GMT-8)	Brian Nash	argos	Yes
08/31/2005 01:41 PM Local (GMT-8)	Brian Nash	argos	No
08/31/2005 01:43 PM Local (GMT-8)	Brian Nash	argos	Yes



# CONSOLIDATING COMMENTS

Useful for consolidating comments and markups received during a discussion group

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

- Documents attached in the lower portion of a document-type business process, or documents attached directly to the business process form



# COPYING AND CONSOLIDATING COMMENTS AND MARKUPS

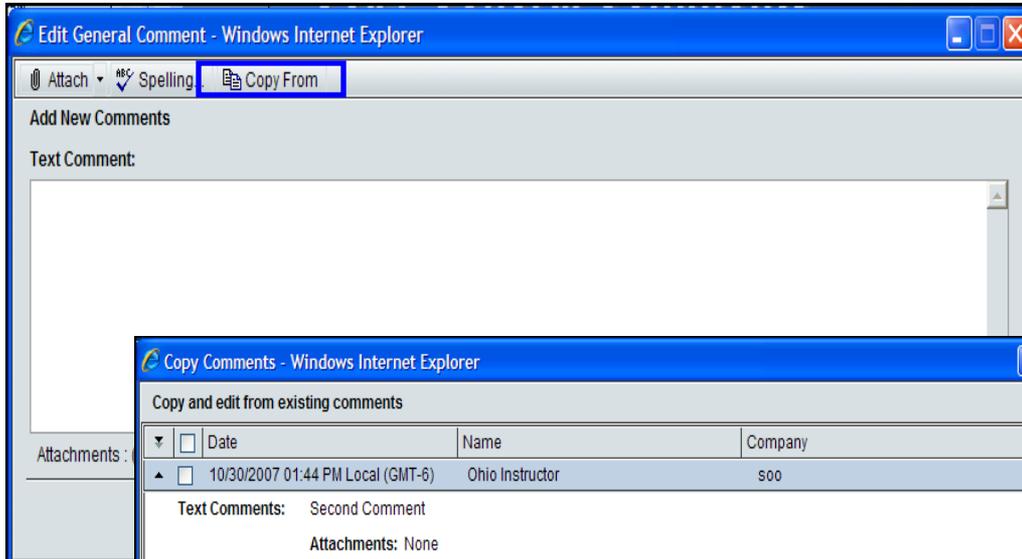
**Note:** Text comments can be copied and consolidated in **General Comments**. Graphic markups that are attached to a **General Comment** cannot be copied or consolidated

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

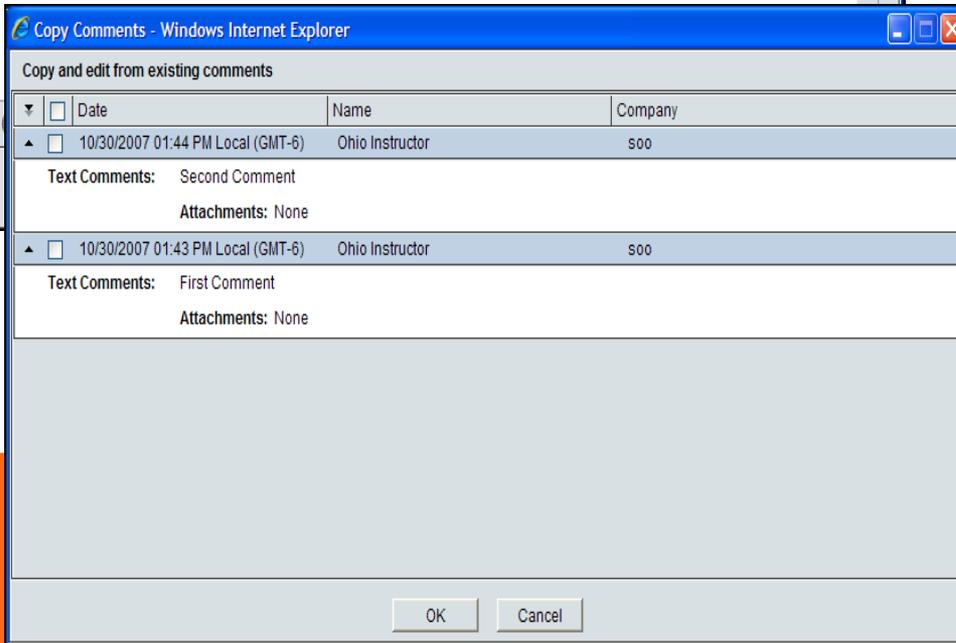


Click General Comments link

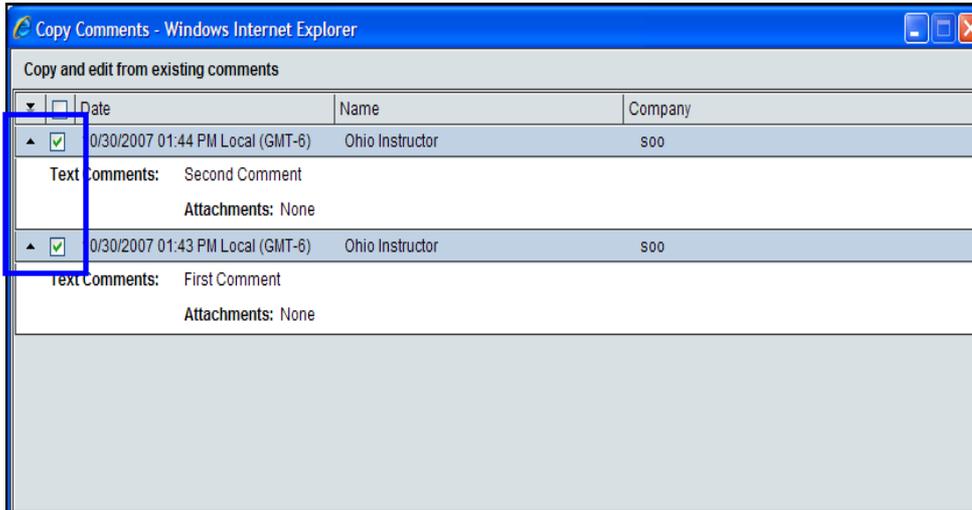
Click Add (or Modify)

Click the Copy From button

- The Copy General Comments window opens, displaying the list of existing comments



# COPY GENERAL COMMENTS

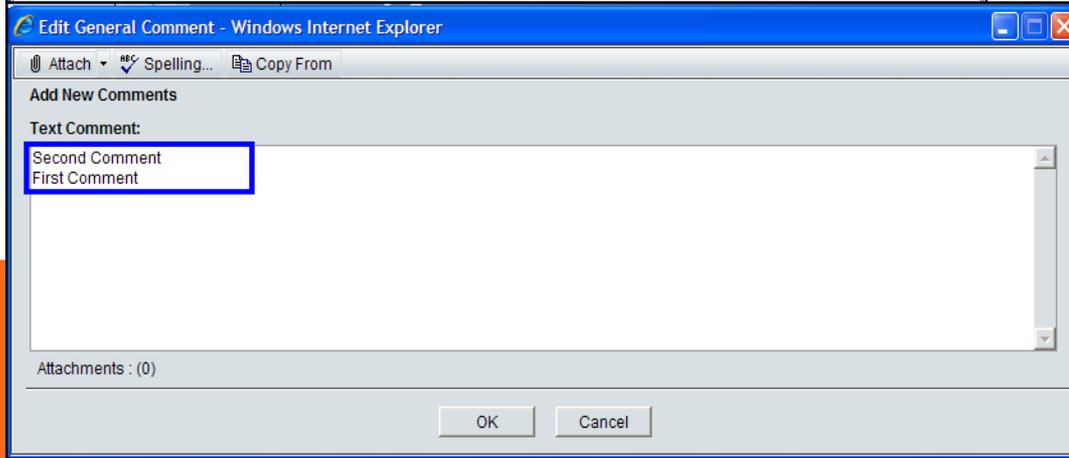


Click the selection box next to each of the comments you want to copy into your comments and click OK

- Any additional file attachments or markups associated with each comment are also copied to the new comment

Make edits as necessary

Click OK



# Discussion Groups

Note: You cannot participate in a discussion group on the **Create** or **End** steps of a business process.

Note: 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. The task owner can hide or delete these comments, or consolidate them for use in creating the final comment or markup.





# Questions?

Call or Email OAKS CI at:  
614.644.2211 or  
[oaksci@ofcc.ohio.gov](mailto:oaksci@ofcc.ohio.gov)

