



Meeting Minutes

Agency/Higher-Ed

Meeting Minute Creation

▶ In Oaks CI navigate to:

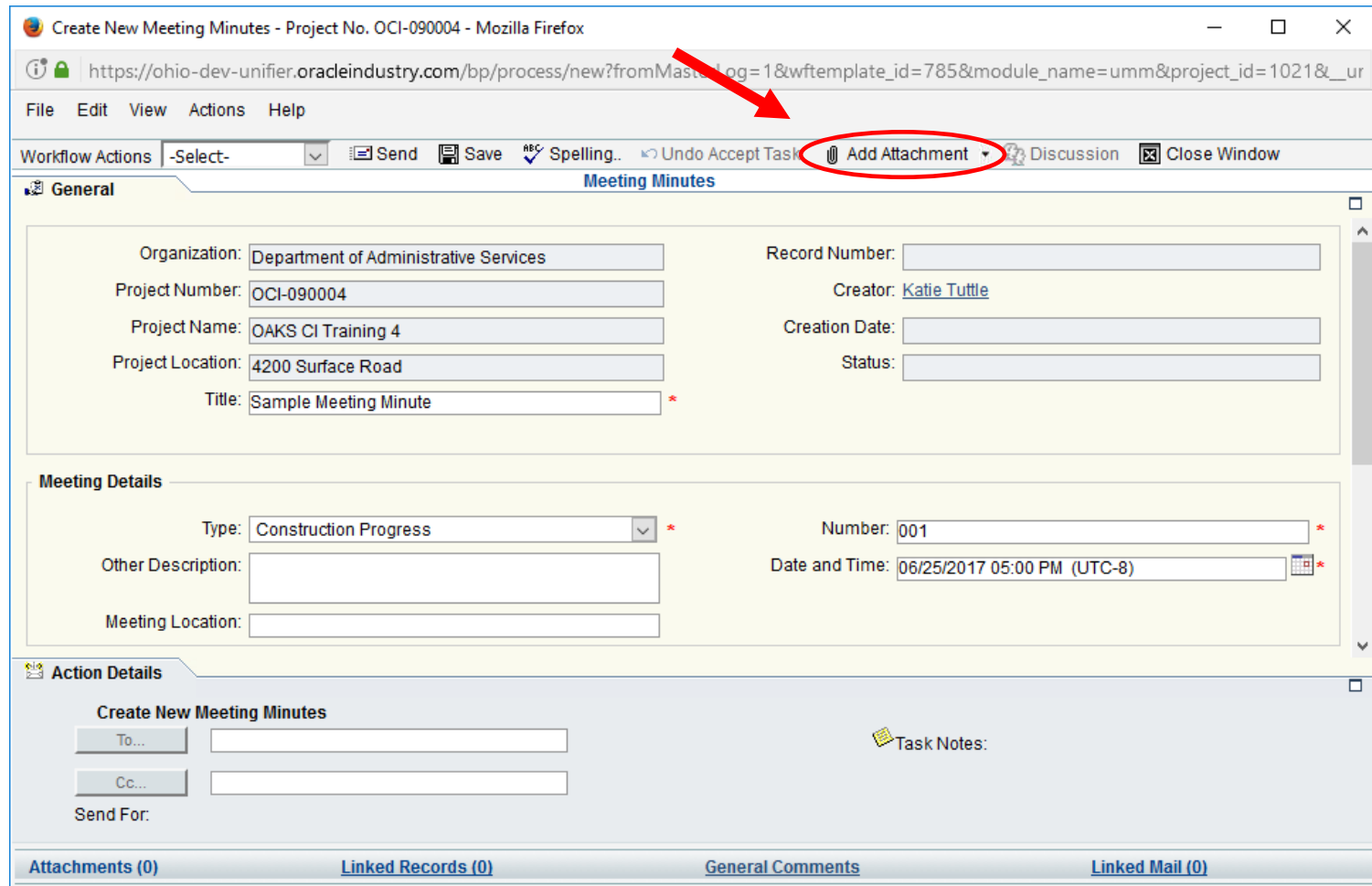
▶ Logs -> Meeting Minutes

▶ Click Create

The screenshot displays the Oracle Primavera Unifier (Development) interface. The top navigation bar shows 'Agency' and 'OAKS CI Trainin...'. The left sidebar menu is expanded to show 'Logs', which is circled in red. Below 'Logs', a list of categories is shown, with 'Meeting Minutes' highlighted in red. A red arrow points from the 'Meeting Minutes' text in the list to the 'Meeting Minutes' category in the sidebar. The main content area shows the 'Meeting Minutes' page with a '+ Create' button circled in red. Below the button is a table with columns 'Record No' and 'Title'. The table contains 23 rows of data, including records like 'MM-0044 Katie's Meeting', 'MM-0043 MEETING MIN', 'MM-0042 Meeting Minute', 'MM-0041 Meeting Minute', 'MM-0040 Meeting 1', 'MM-0039 Meeting Minute', 'MM-0038 mm1', 'MM-0037 CM01', 'MM-0036 3/3/17', 'MM-0035 efgsfgsfg', 'MM-0034 MM23', 'MM-0033 Dance Party', 'MM-0032 123', 'MM-0031 Ross', 'MM-0030 Haight Minutes', 'MM-0029 Scott Maslar', 'MM-0028 MAB @PCS', 'MM-0027 Pamela Carli', 'MM-0026 Jessica Rupel', 'MM-0025 Tharen', 'MM-0024 Catherine Moh', and 'MM-0023 Chuck Grimm'. The bottom right corner of the table area shows 'Total: 44'.

Meeting Minute Creation

- ▶ Complete the upper form (General)
- ▶ All * fields are required
- ▶ Attach Documents, if necessary



Create New Meeting Minutes - Project No. OCI-090004 - Mozilla Firefox

https://ohio-dev-unifier.oracleindustry.com/bp/process/new?fromMasterLog=1&wftemplate_id=785&module_name=umm&project_id=1021&_ur

File Edit View Actions Help

Workflow Actions -Select- Send Save Spelling.. Undo Accept Task **Add Attachment** Discussion Close Window

General Meeting Minutes

Organization: Department of Administrative Services Record Number:

Project Number: OCI-090004 Creator: [Katie Tuttle](#)

Project Name: OAKS CI Training 4 Creation Date:

Project Location: 4200 Surface Road Status:

Title: Sample Meeting Minute *

Meeting Details

Type: Construction Progress * Number: 001 *

Other Description: Date and Time: 06/25/2017 05:00 PM (UTC-8) *

Meeting Location:

Action Details

Create New Meeting Minutes

To...

Cc...

Send For:

Task Notes:

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

Meeting Minutes

- ▶ Select Workflow Action “Publish Minutes”
- ▶ Click on the “Cc” button to choose recipients
- ▶ Click Send

The screenshot displays a web application interface for creating meeting minutes. The main window is titled "Create New Meeting Minutes - Project No. OCI-090004 - Mozilla Firefox". The URL is https://ohio-dev-unifier.oracleindustry.com/bp/process/new?fromMasterLog=1&wftemplate_id=785&module_name=umm&project_id=1021&_ur. The interface includes a menu bar (File, Edit, View, Actions, Help) and a toolbar with buttons for "Send", "Save", "Spelling...", "Undo", "Accept Task", "Add Attachment", "Discussion", and "Close Window".

The "Workflow Actions" dropdown menu is open, showing "Publish Minutes" selected. The "General" section contains the following fields:

- Organization: Department of Administrative Services
- Project Number: OCI-090004
- Project Name: OAKS CI Training 4
- Project Location: 4200 Surface Road
- Title: Sample Meeting Minute *

The "Meeting Details" section includes:

- Type: Construction Progress *
- Other Description: [Empty text box]
- Meeting Location: [Empty text box]

The "Action Details" section shows the "Publish Minutes" workflow action with the following fields:

- To: [Empty text box]
- Cc: [Empty text box]
- Send For: End

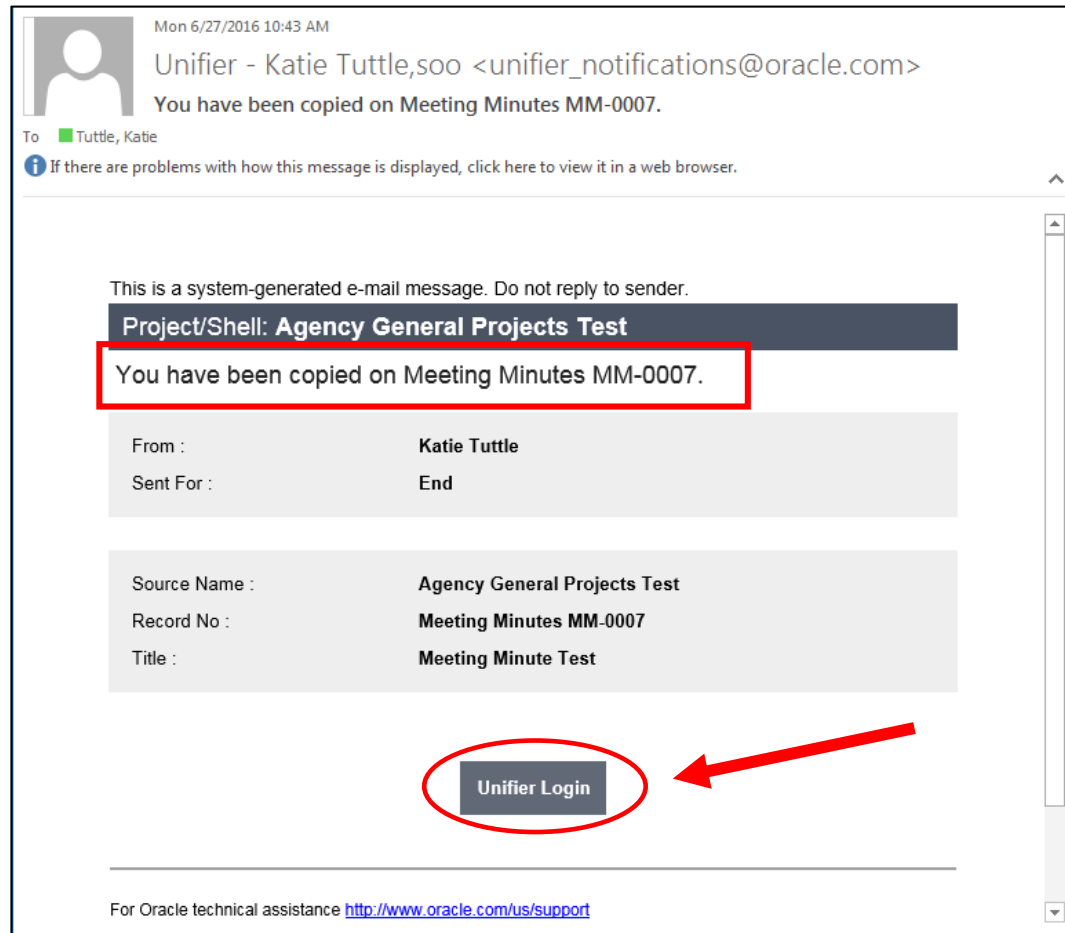
A "User/Group Picker" dialog box is open, showing a list of users and groups. The dialog title is "User/Group Picker - Mozilla Firefox". The URL is https://ohio-dev-unifier.oracleindustry.com/bp/share/project/picker_usergroup?UserGroupPickerli. The search criteria are "List Names from: OAKS CI Training 4" and "Show By: Users/Groups". The list shows 36 items, with the following users and companies listed:

Name	Company
All Project Users	
Archana Atrey	State of Ohio
Barbara Taylor	State of Ohio
Bill Schwertfager	State of Ohio
Katie Tuttle	State of Ohio
Moenique Morris	State of Ohio
Oaks Instructor	State of Ohio
Purna Irukulapati	State of Ohio
Rita Nichols	State of Ohio

The dialog box also includes buttons for "Add", "View Profile", "Members", "OK", "Remove", and "Cancel".

Meeting Minutes

- ▶ Users that were on the “CC” will receive an email that they were copied on the Meeting Minute Record
- ▶ Users can view the meeting minute by clicking on the “Unifier Login” button to login



Questions?

Please contact OAKS CI Support Desk:

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