



# Meeting Minutes

## Agency/Higher-Ed

# Meeting Minute Creation

▶ In Oaks CI navigate to:

▶ Logs -> Meeting Minutes

▶ Click New

The screenshot displays the Oracle Primavera Unifier web application. The top navigation bar includes the Oracle logo and the text 'PRIMAVERA Unifier'. Below this, there are several tabs: 'Home', 'Agency General...', 'Campus Resear...', and 'Northcoast Beh...'. A search bar labeled 'Navigate To...' is visible. The main interface is divided into a left sidebar and a right content area. The sidebar, under the 'User' tab, lists various menu items. The 'Logs' item is circled in red. Below it, the 'Meeting Minutes' item is highlighted in blue, with a red arrow pointing to it from the text on the left. The right content area shows a 'Meeting Minutes' table with columns for 'Record No' and 'Title'. The 'New' button in the top right corner of the content area is also circled in red.

Record No	Title
MM-0006	Meeting Minute Message
MM-0005	Test Meeting Minute
MM-0004	Testing (2)
MM-0003	Testing
MM-0002	
MM-0001	

# Meeting Minute Creation

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

Create New Meeting Minutes - Project No. OCI-080001 - Google Chrome

https://ohio-unifier.oracleindustry.com/bp/process/new?project\_id=1003&module\_name=umm&csvimport=false

File Edit View Actions Help Workflow Actions -Select-

Send Save Spelling.. Undo Accept Task **Add Attachment** Discussion Close Window

**General**

Organization: Department of Administrative Services Record Number:

Project Number: OCI-080001 Creator: [Katie Tuttle](#)

Project Name: Agency General Projects Test Creation Date:

Project Location: OAKS CI Administration Status:

Title: Meeting Minute Test \*

**Meeting Details**

Type: Architect \* Number: Meeting Minute #1 \*

Other Description:  Date and Time: 01/13/2016 05:00 PM (UTC-8) \*

Meeting Location:

**Next Meeting Details**

Date and Time:  Meeting Location:

**Notes**

**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

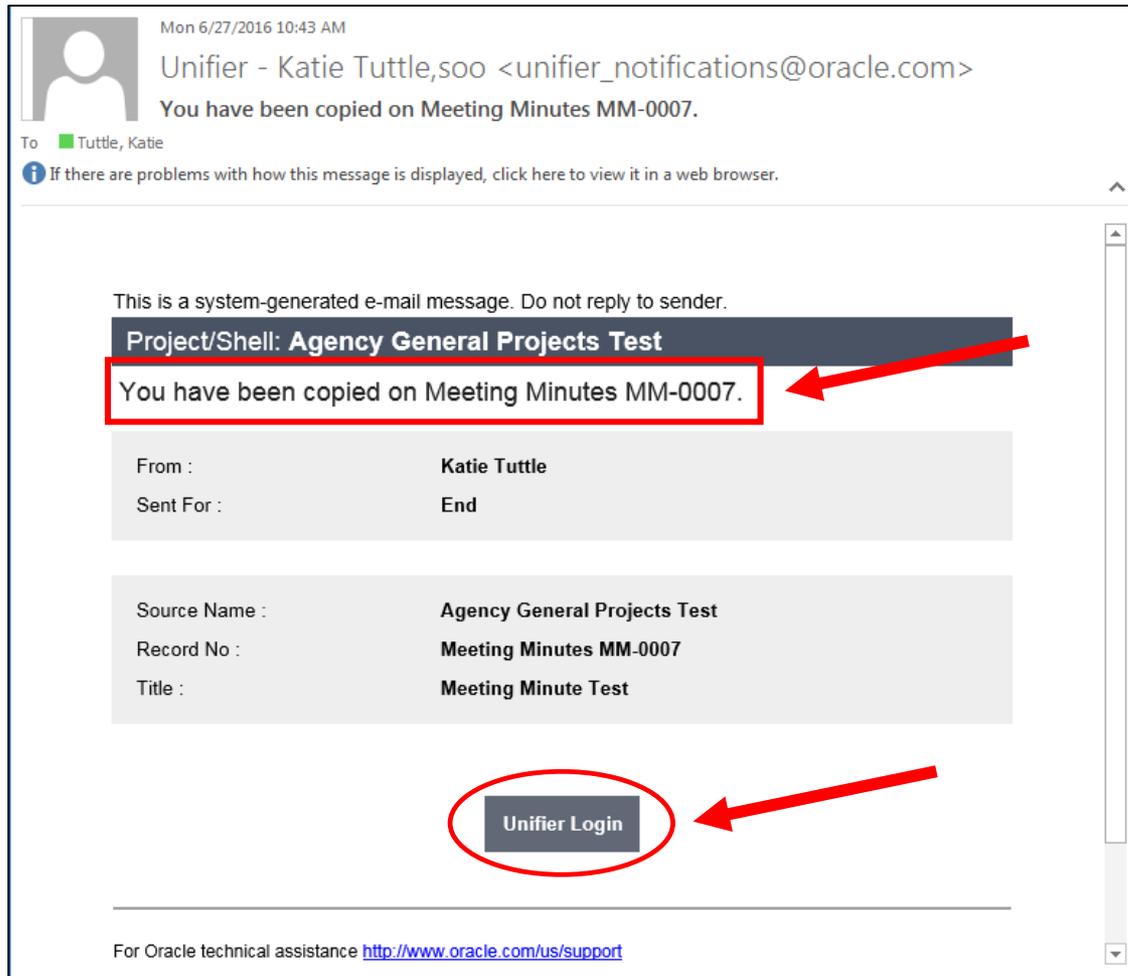
The screenshot displays the 'Create New Meeting Minutes' interface in Google Chrome. The main window shows a form with the following fields:

- Organization: Department of Administrative Services
- Project Number: OCI-080001
- Project Name: Agency General Projects Test
- Project Location: OAKS CI Administration
- Title: Meeting Minute Test
- Record Number: [Empty]
- Creator: Katie Tuttle
- Creation Date: [Empty]
- Status: [Empty]
- Meeting Details: Type: Architect, Number: Meeting Minute #1, Date and Time: 01/13/2016 05:00 PM (UTC-8)
- Next Meeting Details: Date and Time: [Empty], Meeting Location: [Empty]

The 'Send' button is circled in red, and an arrow points to it. The 'Workflow Actions' dropdown menu is also circled in red, showing 'Publish Minutes' as the selected option. The 'User/Group Picker' window is open, showing a list of users and groups, with an arrow pointing to the 'Add' button. The 'Publish Minutes' section at the bottom is also circled in red, showing 'To...' and 'Cc...' buttons, with the 'Cc...' button being the focus of the second step in the instructions.

# 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 email link



# Questions?

Please contact OAKS CI Support Desk:

[oaksci@ofcc.ohio.gov](mailto:oaksci@ofcc.ohio.gov)

614.644.2211