



# Meeting Minutes

## K-12 Cloud

# Meeting Minute Creation

- ▶ In Oaks CI navigate to:
  - ▶ Logs -> Meeting Minutes K12
  - ▶ Click New

The screenshot displays the Oracle Primavera Unifier web application. The interface includes a top navigation bar with the Oracle logo and 'PRIMAVERA Unifier' text. Below this is a browser window with tabs for 'Home', 'Talawanda-CSD...', and 'Brown-LSD-CAR...'. The main content area is divided into a left sidebar and a main pane. The sidebar, under the 'User' tab, lists various modules: Alerts, uMail, Mailbox, Collaboration, Information, Cost Manager, Data Manager, Document Manager, Logs, Action Items K12, Applications for Payment..., Budgets K12, Closeout - Professional S..., Contract K12, Contract Modification K12, Contract Schedule of Valu..., Fund Release K12, Fund Transfers K12, Meeting Minutes K12, Miscellaneous Change O..., Miscellaneous Commit K12, and Miscellaneous Invoice K12. The 'Logs' module is circled in red. A red arrow points from the 'Meeting Minutes K12' item in the sidebar to the 'New' button in the main pane. The main pane shows a table of 'Meeting Minutes K12' items with columns for 'Date and Time' and 'Title'. The table contains 23 items, with the first 10 being 'BLSD Core Team Meeting Minutes' and the remaining 13 being 'Record Number Test'.

Date and Time	Title
04/13/2015	BLSD Core Team Meeting Minutes
03/26/2015	BLSD Core Team Meeting Minutes
02/10/2015	BLSD Core Team Meeting Minutes
01/14/2015	BLSD Core Team Meeting Minutes
12/16/2014	BLSD Core Team Meeting Minutes
11/24/2014	BLSD Core Team Meeting Minutes
10/23/2014	BLSD Core Team Meeting Minutes
09/08/2014	BLSD Core Team Meeting Minutes
08/15/2014	BLSD Core Team Meeting Minutes
07/06/2015	Record Number Test
07/07/2014	BLSD Core Team Meeting Minutes
06/26/2014	BLSD Core Team Meeting Minutes
07/06/2015	Record Number Test
05/12/2014	BLSD Core Team Meeting Minutes
07/06/2015	Record Number Test
04/14/2014	BLSD Core Team Meeting Minutes
07/06/2015	Record Number Test
07/06/2015	Record Number Test
03/10/2014	BLSD Core Team Meeting Minutes
02/10/2014	BLSD Core Team Meeting Minutes
07/06/2015	Record Number Test 2
06/25/2015	Record Number Test
01/23/2014	BLSD Core Team Meeting Minutes

# Meeting Minute Creation

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

Create New Meeting Minutes K12 - Project No. OCI-150041.02 - Google Chrome

https://ohio-stage-unifier.oracle.com/bp/process/new?project\_id=1097&module\_name=ummk&csvimport=false

File Edit View Actions Help Workflow Actions -Select-

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

Meeting Minute My Computer Unifier Folder

**General**

Project Number: OCI-150041.02 Record Number:

Project Name: Brown - New K-12 Creator: Katie Tuttle

Organization Name: Brown LSD Creation Date:

Facility Name: Brown - New K-12 Status:

Title: Test Meeting Minute \*

**Meeting Details**

Type: Core Meeting \* Number: 123456 \*

Other Description:

Date and Time: 04/15/2016 05:00 PM (UTC-8) \* Meeting Location: Brown Local School District

**Next Meeting Details**

Date and Time: 04/22/2016 05:00 PM (UTC-8) \* Meeting Location: Brown Local School District

**Notes**

**Action Details**

Create New Meeting Minutes K12

To...

Cc...

Send For:

Task Notes:

javascript:local() ds (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 shows a web browser window titled "Create New Meeting Minutes K12 - Project No. OCI-150041.02 - Google Chrome". The URL is [https://ohio-stage-unifier.oracleindustry.com/bp/process/new?project\\_id=1097&module\\_name=ummk&csvimport=false](https://ohio-stage-unifier.oracleindustry.com/bp/process/new?project_id=1097&module_name=ummk&csvimport=false). The browser's menu bar includes File, Edit, View, Actions, and Help. A red arrow points to the "Send" button in the toolbar. Another red circle highlights the "Workflow Actions" dropdown menu, which is open to show "Publish Minutes", "Publish Agenda", and "Publish Minutes".

The main form is titled "Meeting Minutes K12" and has a "General" tab. It contains the following fields:

- Project Number: OCI-150041.02
- Project Name: Brown - New K-12
- Organization Name: Brown LSD
- Facility Name: Brown- New K-12
- Title: Test Meeting Minute
- Record Number: (empty)
- Creator: Katie Tuttle
- Creation Date: (empty)
- Status: (empty)

The "Meeting Details" section includes:

- Type: Core Meeting
- Other Description: (empty)
- Date and Time: 04/15/2016 05:00 PM (UTC-8)

The "Next Meeting Details" section includes:

- Date and Time: 04/22/2016 05:00 PM (UTC-8)

The "Notes" section is empty.

The "Action Details" section is highlighted with a red box and contains:

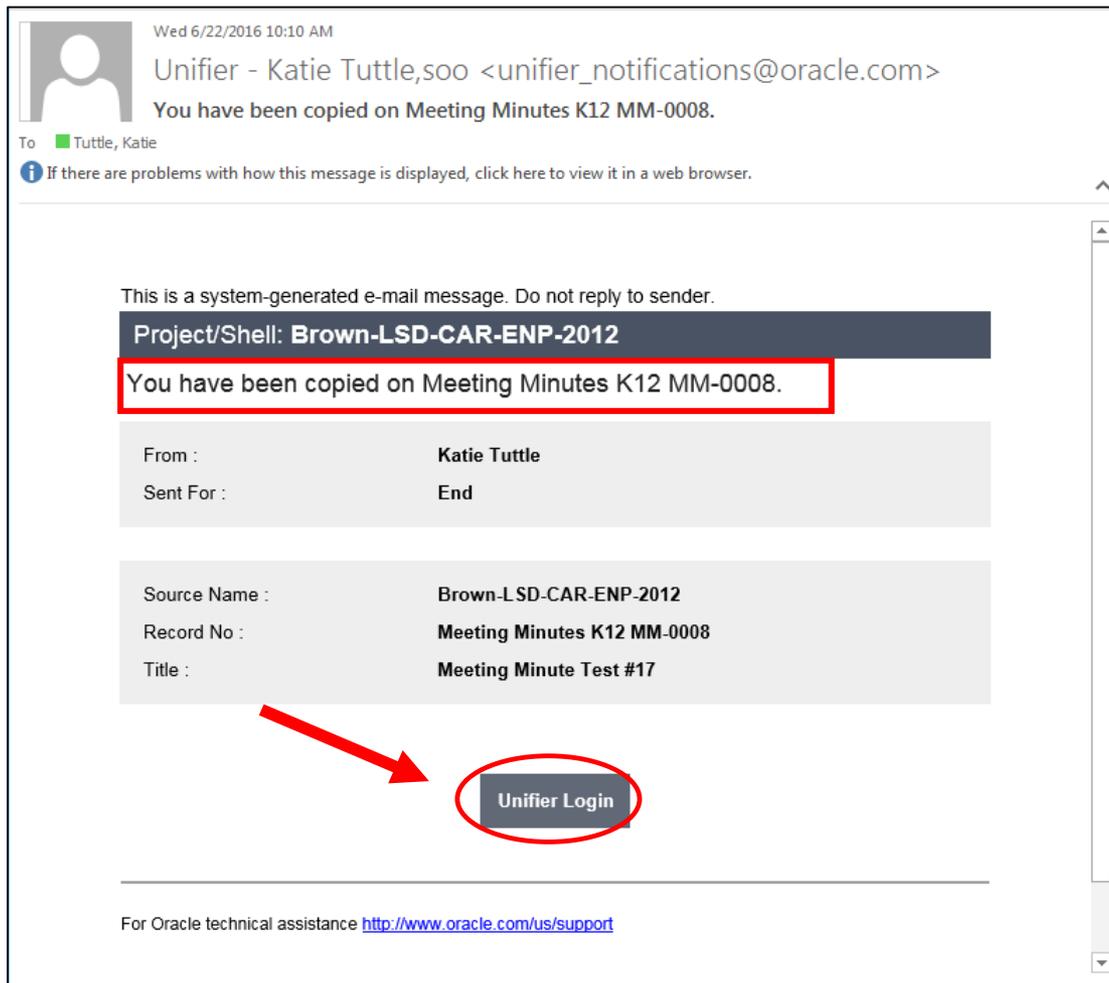
- Publish Minutes**
- To: (empty)
- Cc: (empty)
- Send For: End

A red arrow points from the "Cc" field to a "User/Group Picker" dialog box. This dialog box is titled "User/Group Picker - Google Chrome" and shows a list of users and groups. The "Selected Users/Groups" section is empty.

At the bottom of the form, there are links for "Attachments (1)", "Linked Records (0)", "General Comments", and "Linked Mail (0)".

# 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



# Questions?

Please contact OAKS CI Support Desk:

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