



Meeting Minutes

K-12 Legacy

Meeting Minute Creation

▶ In Oaks CI navigate to:

▶ Logs -> Meeting Minutes

▶ Click New

The screenshot shows the Oracle 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:'umml'. The user is identified as Katie Tuttle. The interface includes a navigation menu with 'Home', 'Company Workspace', and 'School Facilities'. The 'Meeting Minutes' section is active, showing a table with 65 items. The table has columns for 'Date and Time' and 'Title'. The 'Logs' folder in the left sidebar is circled in red, and the 'New' button in the top menu is also circled in red. A red arrow points from the 'Logs' folder towards the 'Meeting Minutes' table.

Date and Time	Title
03/31/2016	2016-03-31 BP#3 CA #047
03/24/2016	2016-03-24 BP#3 CA #046 N
03/17/2016	2016-03-17 BP#3 CA #045 N
03/10/2016	2016-03-10 BP#3 CA #044 N
03/03/2016	2016-03-03 BP#3 CA #043 N
02/25/2016	2016-02-25 BP#3 CA #042 N
02/18/2016	2016-02-18 BP#3 CA #041 N
02/11/2016	2016-02-11 BP#3 CA #040 N
02/04/2016	2016-02-04 BP#3 CA #039 N
01/28/2016	2016-01-28 BP#3 CA #038 N
01/21/2016	2016-01-21 BP#3 CA #037 N
01/14/2016	2016-01-14 BP#3 CA #036 N
01/07/2016	2016-01-07 BP#3 CA #035 N
12/17/2015	2015-12-17 BP#3 CA #034 N
12/10/2015	2015-12-10 BP#3 CA #033 -
12/03/2015	2015-12-03 BP#3 CA #032 N
11/19/2015	2015-11-19 BP#3 CA #031 N
11/12/2015	2015-11-12 BP#3 CA #030 N
11/05/2015	2015-11-05 BP#3 CA #029 N
10/29/2015	2015-10-29 BP#3 CA #028 N
10/22/2015	2015-10-22 BP#3 CA #027 N
10/08/2015	2015-10-06 BP#3 CA #026 N
10/06/2015	2015-10-06 BP#3 #025 Alum

Meeting Minute Creation

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

The screenshot shows the 'Create New Meeting Minutes' web form in Internet Explorer. The form is titled 'Create New Meeting Minutes - Project No. SFC-130336.01'. The URL is https://oaksci.osfc.ohio.gov/bp/process/new?project_id=1137&module_name=umm&csvimport=false. The form has several sections: 'General', 'Meeting Details', 'Next Meeting Details', and 'Action Details'. The 'General' section includes fields for Project Number (SFC-130336.01), Project Name (New PK - 5 Batavia), Organization Name (Batavia LSD), Facility Name (2400 Clermont Center Dr), and Title (Meeting Minutes). The 'Meeting Details' section includes Type (Pre-Construction), Other Description, Meeting Date and Time (04/26/2016 05:00 PM Local (GMT-5)), and Meeting Location. The 'Next Meeting Details' section includes Next Meeting Scheduled At and Next Meeting Location. The 'Action Details' section includes 'Create New Meeting Minutes' and 'Send For' fields. A red box highlights the 'Add Attachment' button, which has a dropdown menu with 'Meeting Minutes' and 'Unifier Folder' options. A red arrow points from the 'Unifier Folder' option to a file picker dialog. The file picker dialog shows a list of files in the 'Meeting Minutes' folder, with columns for Name, Size, Upload Date, Owner, and Title. The 'OK' button in the file picker dialog is circled in red.

Project Number: SFC-130336.01
Project Name: New PK - 5 Batavia
Organization Name: Batavia LSD
Facility Name: 2400 Clermont Center Dr
Title: Meeting Minutes

Meeting Details
Type: Pre-Construction
Other Description:
Meeting Date and Time: 04/26/2016 05:00 PM Local (GMT-5)
Meeting Location:

Next Meeting Details
Next Meeting Scheduled At:
Next Meeting Location:

Notes:
Notes:

Action Details
Create New Meeting Minutes
To:
Cc:
Send For:

BP	Name	Size	Upload Date	Owner	Title
2014-07-03	BP#1 - Pre-Con	277 KB	07/21/2014	Brett Macht	
2014-07-22	BP#1 CA Mem	294 KB	07/24/2014	Brett Macht	
2014-07-29	BP#1 CA Mem	373 KB	07/30/2014	Brett Macht	
2014-08-12	BP#1 CA Mem	329 KB	08/15/2014	Brett Macht	
2014-08-19	BP#1 CA Mem	339 KB	08/21/2014	Brett Macht	
2014-08-26	BP#1 CA Mem	404 KB	09/03/2014	Brett Macht	
2014-09-02	BP#1 CA Mem	407 KB	09/03/2014	Brett Macht	
2014-09-09	BP#1 CA Mem	459 KB	10/06/2014	Brett Macht	
2014-09-16	BP#1 CA Mem	400 KB	10/06/2014	Brett Macht	
2014-09-23	BP#1 CA Mem	408 KB	10/06/2014	Brett Macht	
2014-09-30	BP#1 CA Mem	407 KB	10/06/2014	Brett Macht	
2014-10-07	BP#1 CA Mem	406 KB	10/20/2014	Brett Macht	
2014-10-14	BP#1 CA Mem	395 KB	10/20/2014	Brett Macht	
2014-10-21	BP#1 CA Mem	397 KB	12/12/2014	Brett Macht	
2014-10-28	BP#1 CA Mem	275 KB	12/12/2014	Brett Macht	
2014-11-04	BP#1 CA Mem	2 MB	12/12/2014	Brett Macht	
2014-11-18	BP#1 CA Mem	2 MB	12/12/2014	Brett Macht	

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 - Project No. SFC-130336.01 - Internet Explorer". The address bar shows the URL: https://oaksci.osfc.ohio.gov/bp/process/new?project_id=1137&module_name=umm&csvimport=false. The browser's menu bar includes File, Edit, View, Actions, and Help. The "Workflow Actions" menu is open, showing "Publish Agenda" and "Publish Minutes" (highlighted with a red circle). A red arrow points to the "Send" button in the browser's toolbar.

The main application window is titled "Meeting Minutes" and contains the following fields:

- Project Number: SFC-130336.01
- Project Name: New PK - 5 Batavia
- Organization Name: Batavia LSD
- Facility Name: 2400 Clermont Center Dr
- Title: Meeting Minutes
- Record Number: [Empty]
- Creator: Katie Tuttle
- Creation Date: [Empty]
- Status: [Empty]
- Meeting Details: Type: Pre-Construction, Other Description: [Empty], Meeting Date and Time: 04/26/2016 05:00 PM Local (GMT-5)
- Next Meeting Details: Next Meeting Scheduled At: [Empty]
- Notes: [Empty]

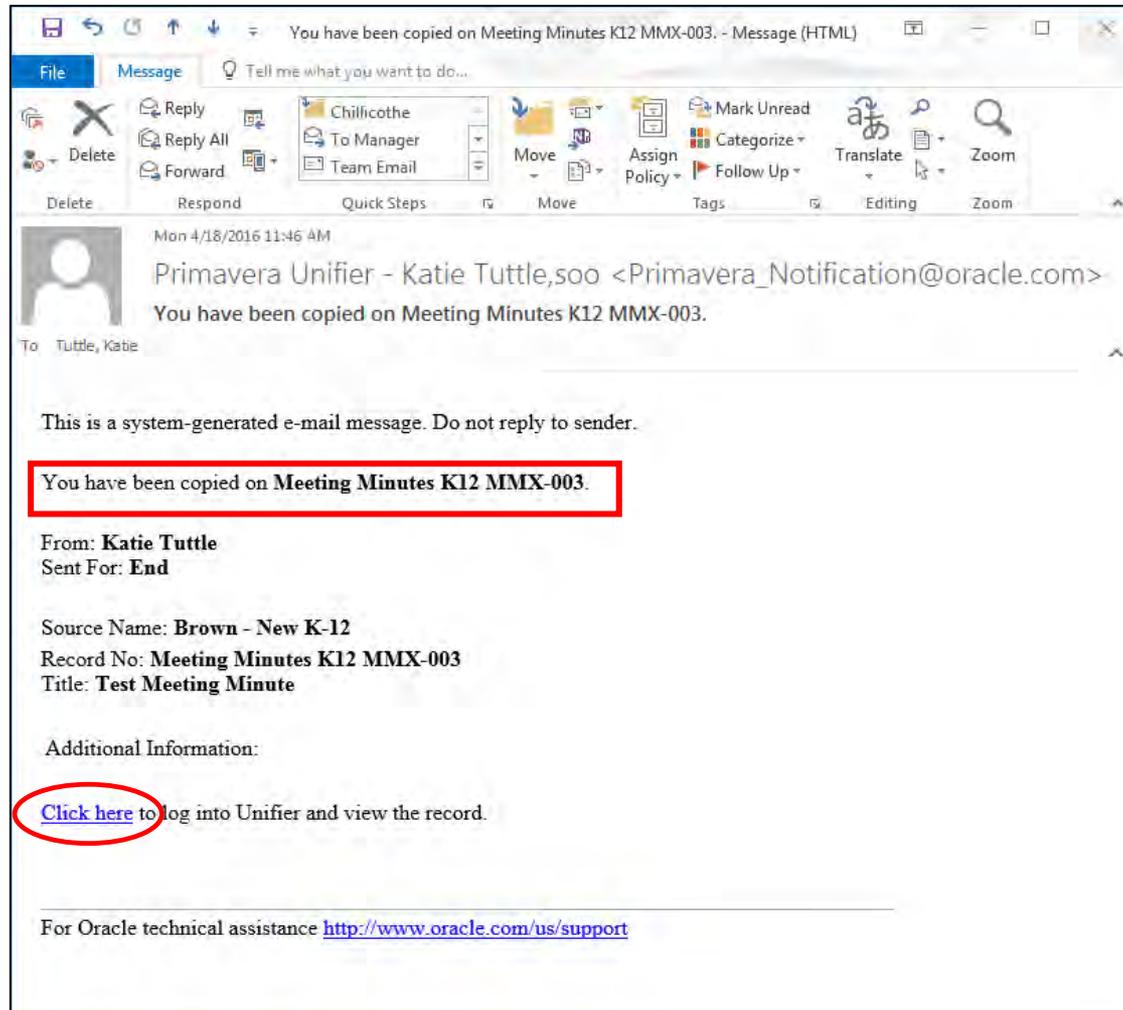
The "Action Details" section at the bottom is highlighted with a red box and contains:

- Publish Minutes
- To: [Empty]
- Cc... [Empty] (highlighted with a red circle)
- Send For: End

A "User/Group Picker" dialog box is open, showing a list of users and groups. The "List Names from" dropdown is set to "New PK - 5 Batavia". The "Users/Groups - Current View: All" section shows 31 items. The "Selected Users/Groups" section is currently empty. The dialog box has "Add", "View Profile", "Members", "OK", "Remove", and "Cancel" buttons.

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:

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