



Meeting Minutes

Meeting Minute Creation

▶ In Oaks CI navigate to:

▶ Logs -> Meeting Minutes

▶ Click New

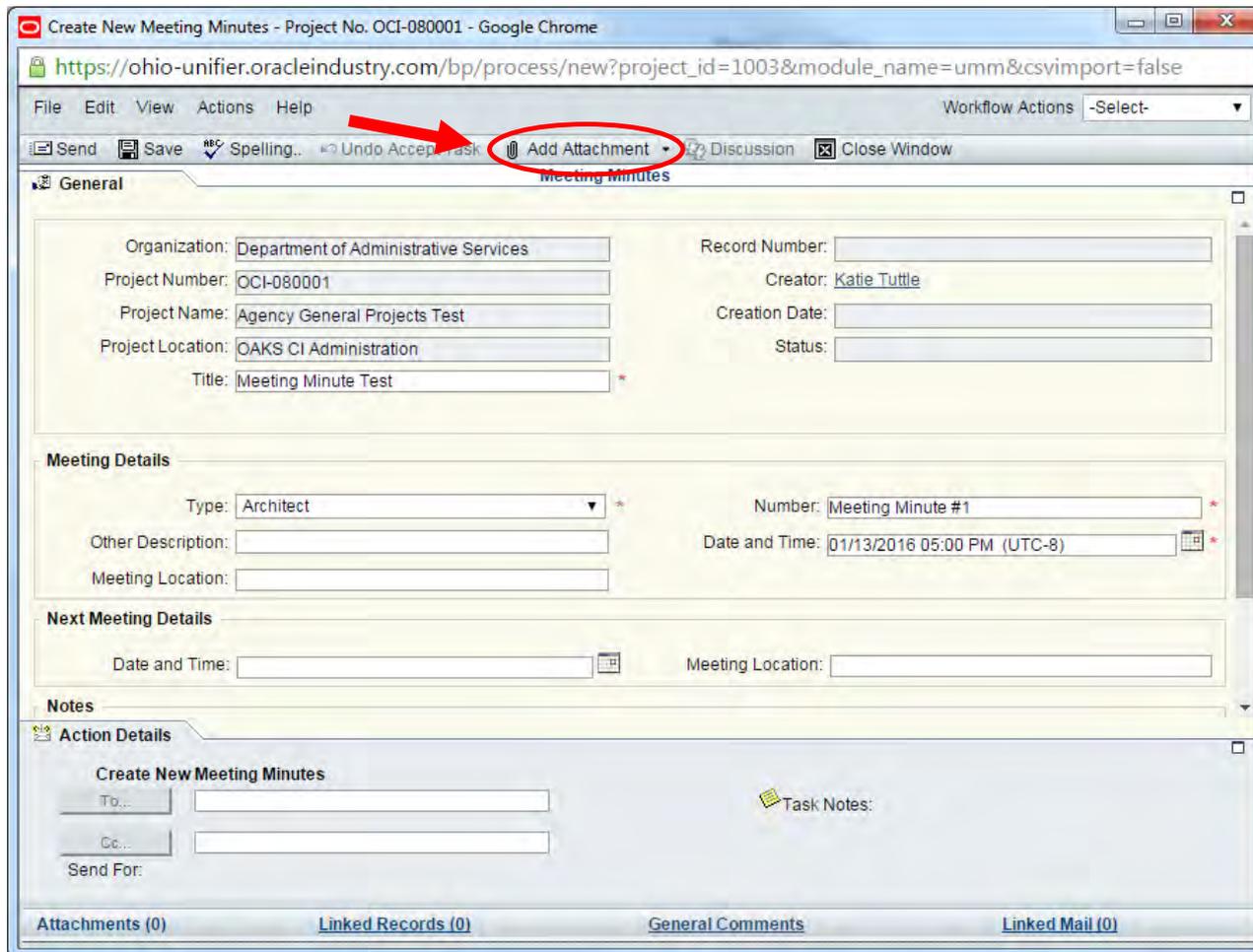
The screenshot shows the Oracle Primavera Unifier web interface. The browser address bar displays <https://ohio-unifier.oracleindustry.com/bp/g/nav/index>. The page header includes "ORACLE PRIMAVERA UNIFIER" and "Last login: 09/29/2015 07:04 AM". The navigation pane on the left shows a tree structure with "Logs" selected and circled in red. A red arrow points from the "Logs" folder to the "Meeting Minutes" folder. The "Meeting Minutes" folder is also circled in red. The main content area shows a table with 4 items:

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

The "New" button in the top toolbar is also circled in red, with a red arrow pointing to it.

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 \(0\)](#)

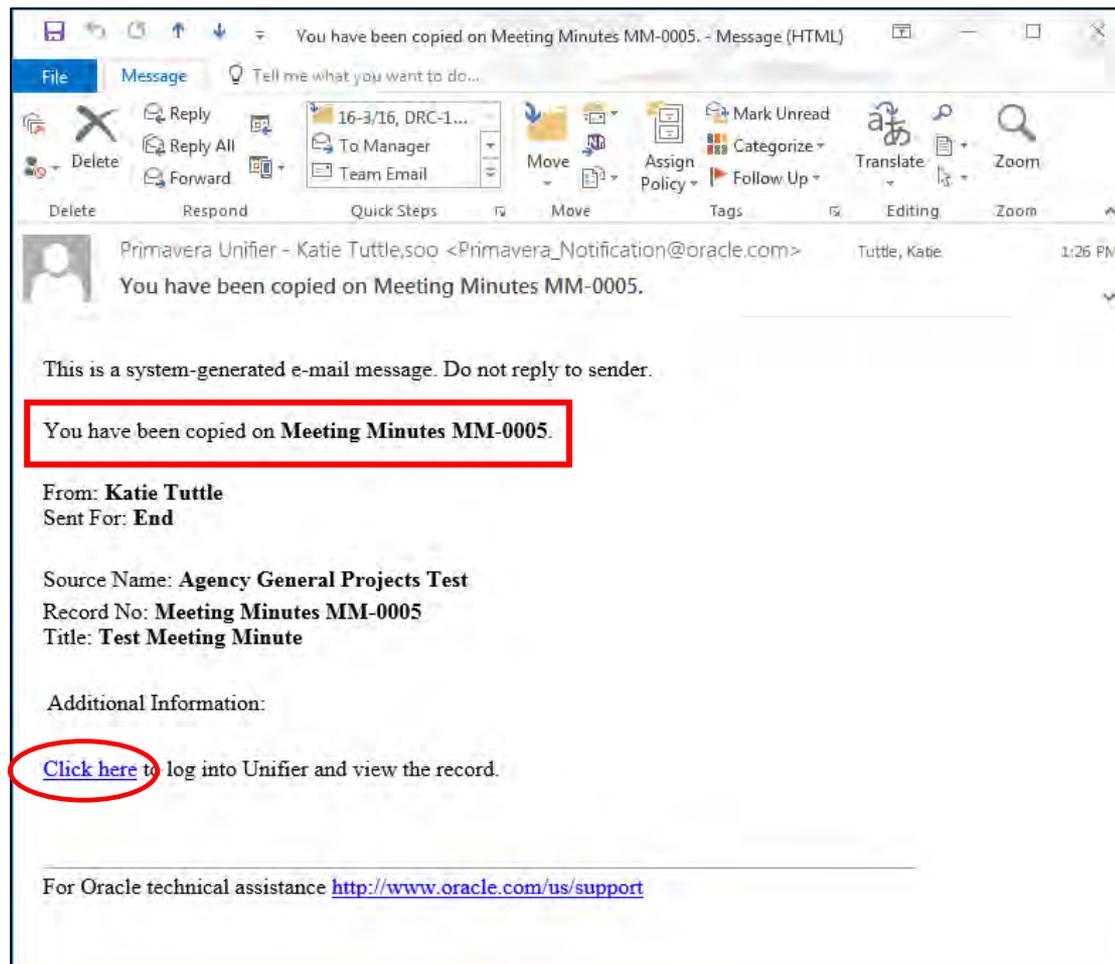
Meeting Minutes

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

The screenshot displays the 'Create New Meeting Minutes' web application interface. The browser window title is 'Create New Meeting Minutes - Project No. OCI-080001 - Google Chrome'. The URL is https://ohio-unifier.oracleindustry.com/bp/process/new?project_id=1003&module_name=unifier&csvimport=false. The interface includes a menu bar with 'File', 'Edit', 'View', 'Actions', and 'Help'. A 'Workflow Actions' dropdown menu is open, showing 'Publish Minutes', 'Publish Agenda', and 'Publish Minutes'. A red arrow points to the 'Send' button in the top toolbar. Another red arrow points to the 'Cc...' button in the 'Publish Minutes' action details. The main form contains fields for 'Organization' (Department of Administrative Services), 'Project Number' (OCI-080001), 'Project Name' (Agency General Projects Test), 'Project Location' (OAKS CI Administration), and 'Title' (Meeting Minute Test). The 'Meeting Details' section includes 'Type' (Architect), 'Number' (Meeting Minute #1), 'Other Description', 'Meeting Location', 'Date and Time' (01/13/2016 05:00 PM (UTC-8)), and 'Next Meeting Details'. The 'Notes' section is titled 'Action Details' and contains the 'Publish Minutes' action details, including 'To...', 'Cc...', and 'Send For: End'. A 'User/Group Picker' window is open, showing a list of users and groups, with a red arrow pointing to the 'Add' button. The bottom of the interface shows 'Attachments (0)', '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 email link



Questions?

Please contact OAKS CI Support Desk:

oaksci@ofcc.ohio.gov

614.644.2211