



# Meeting Minutes

## Agency/Higher-Ed

# Meeting Minute Creation

- ▶ In Oaks CI navigate to:
  - ▶ Logs -> Meeting Minutes
  - ▶ Click **Create**

ORACLE Primavera Unifier (Test)

Company Work... OAKS CI Traini... OAKS CI Distric... Oak Hills Local ...

Agency > OAKS CI Training > OAKS CI Training 1

Meeting Minutes

+ Create Actions View All Records X

Record No	Title
MM-0024	DRC-0092 Meeting minute aTest...
MM-0023	DAS RT 002 - Phase 1 - Cooling
MM-0022	COOLING MINUTES - 001
MM-0021	Progress Meeting Minutes DRC...
MM-0020	MEETING#201
MM-0019	Telephone Conversation regardin...
MM-0018	Meet 1121
MM-0017	Meeting Nov 21 2011
MM-0016	Acme Meeting
MM-0015	Weekly Meeting
MM-0014	Meeting
MM-0013	Acme Meeting
MM-0012	
MM-0011	
MM-0010	
MM-0009	
MM-0008	
MM-0007	
MM-0006	
MM-0005	
MM-0004	
MM-0003	
MM-0002	
MM-0001	

Total: 24



# 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

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/umm/1006/125?\_uref=uuu758971901t2

### Create New Meeting Minutes

Send Save

**General**

Organization Department of Administrative Services	Record Number
Project Number OCI-080001	Creator Matthew Weber
Project Name OAKS CI Training 1	Creation Date
Project Location Surface Road	Status

**Title \***  
Meeting Minute Test

**Meeting Details**

<b>Type *</b> Architect	<b>Number *</b> Meeting Minute #1
Other Description	<b>Date and Time *</b> 09/14/2020 05:00 PM (UTC-8)
Meeting Location	

**Next Meeting Details**

<b>Date and Time</b> MM/DD/YYYY HH:MM AM	Meeting Location
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**Attachments** | Comments | Linked |

Document Manager...

Information  
No Attachments.



# Meeting Minutes

- ▶ When the record is ready to move forward, click **Send**
- ▶ Select Workflow Action: **Publish Minutes**

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

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/umm/1006/125?\_uref=uuu758971901t2

### Create New Meeting Minutes

**Send Save**

**General**

<b>Organization</b> Department of Administrative Services	<b>Record Number</b> 
<b>Project Number</b> OCI-080001	<b>Creator</b> Matthew Weber
<b>Project Name</b> OAKS CI Training 1	<b>Creation Date</b> 
<b>Project Location</b> Surface Road	
<b>Title *</b> Meeting Minute Test	

**Attachments** Comment

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

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/umm/1006/125?\_uref=uuu758971901t2

### Create New Meeting Minutes Workflow Action Details

**Workflow Action Details**

**Action Details**

**Workflow Actions \***

- Select
- Select
- Publish Agenda
- Publish Minutes**

**Send For**

**Cancel Send**



# Meeting Minutes

- ▶ Click on the **Select** button in the “Cc” field to choose recipients
- ▶ Choose recipients, click **Done**
- ▶ Click **Send**

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

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/umm/1006/125?\_uref=uuu75897190112

Create New Meeting Minutes Workflow Action Details

General

Organization: Department of Administration  
Project Number: OCI-080001  
Project Name: OAKS CI Training 1  
Project Location: Surface Road  
Title: Meeting Minute Test

Meeting Details  
Type: Architect  
Other Description  
Meeting Location

Workflow Actions: Publish Minutes  
Send For: End

CC: Start typing for suggestions...

Cancel Send

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

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/umm/1006/125?\_uref=uuu75897190112

User and Group Picker

View: Users/Groups

Users and Groups

Available Items		Selected Items	
Name	Company	Name	Company
All Project Users		Users	
Archana Atrey	State of Ohio	Archana Atrey	State of Ohio
Brett Gundlach	State of Ohio		
Cindy Pizzuto	State of Ohio		
Consultant Student1	State of Ohio		
Consultant Student10	State of Ohio		
Consultant Student11	State of Ohio		
Consultant Student12	State of Ohio		
Consultant Student13	State of Ohio		
Consultant Student14	State of Ohio		
Consultant Student15	State of Ohio		

Total: 44

Cancel Done

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

ohio-uat-unifier.oracleindustry.com/bp/mod/bp/record/new/umm/1006/125?\_uref=uuu75897190112

Create New Meeting Minutes Workflow Action Details

General

Organization: Department of Administration  
Project Number: OCI-080001  
Project Name: OAKS CI Training 1  
Project Location: Surface Road  
Title: Meeting Minute Test

Meeting Details  
Type: Architect  
Other Description  
Meeting Location

Workflow Actions: Publish Minutes  
Send For: End

CC: Archana Atrey

Cancel Send



# 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

This is a system-generated e-mail message. Do not reply to sender.

**Project/Shell: OAKS CI Training 1**

**You have been copied on Meeting Minutes MM-0025.**

From :	Matthew Weber
Sent For :	End

  

Source Name :	OAKS CI Training 1
Record No :	Meeting Minutes MM-0025
Title :	Meeting Minute Test



For Oracle technical assistance <http://www.oracle.com/us/support>



# Questions?

Please contact OAKS CI Support Desk:

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

614.644.2211

