
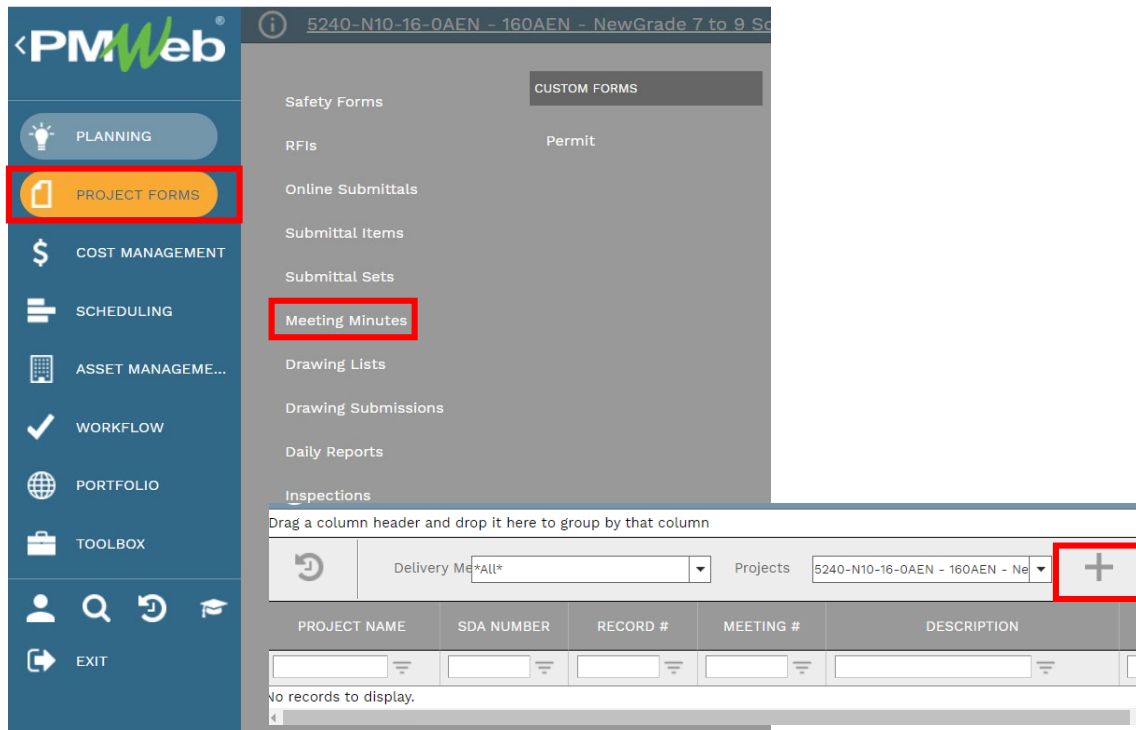


OPEN THE MODULE

- Choose **Project Forms** -> **Meeting Minutes**
- This displays the **Manager View** for the module and shows all records.
- To search for a document to modify, use the columns to filter for the data you need. For example, use the Record # column to search for a document.
- To add a new document, click the **Add** button 



The screenshot shows the PMWeb interface. On the left is a vertical navigation menu with categories: PLANNING, PROJECT FORMS (highlighted with a red box), COST MANAGEMENT, SCHEDULING, ASSET MANAGEME..., WORKFLOW, PORTFOLIO, and TOOLBOX. Under PROJECT FORMS, the 'Meeting Minutes' option is highlighted with a red box. The main content area shows a list of forms under 'CUSTOM FORMS', including Safety Forms, RFIs, Online Submittals, Submittal Items, Submittal Sets, Meeting Minutes, Drawing Lists, Drawing Submissions, Daily Reports, and Inspections. At the bottom, there is a table header with columns: PROJECT NAME, SDA NUMBER, RECORD #, MEETING #, and DESCRIPTION. A red box highlights the '+ Add' button next to the table header.

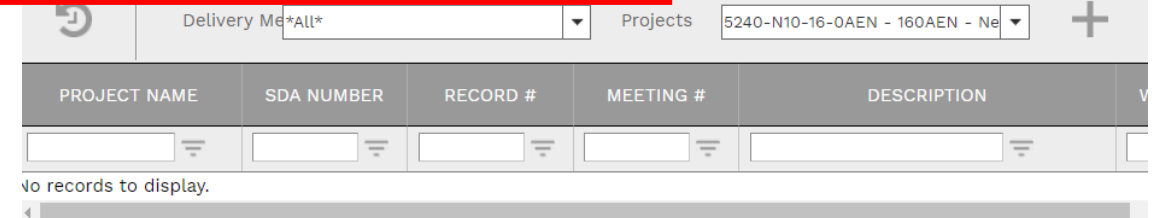
PMWeb

**MEETING
MINUTES**

IMPORTANT

Before creating a new Meeting Minute document, either a new document or one based off of a previous document, you must search for the last document created based off the Record # field and the Meeting Type. Use the column filter function or drag the Record # field to the top of the page to be able to group by that column. This will ensure the meeting number you are using is the next available one.

Drag a column header and drop it here to group by that column



The screenshot shows the table header and the 'Add' button. The table header has columns: PROJECT NAME, SDA NUMBER, RECORD #, MEETING #, and DESCRIPTION. A red box highlights the '+ Add' button next to the table header. The text 'No records to display.' is visible below the table.

ADD A NEW RECORD

- Click **Add** to enter all relevant information in the document. Any field marked with an asterisk is a required field.
- Click the **Save** button when finished.

IMPORTANT:

- **Meeting Reference** field is 13 characters (this is the same field as the **Record #** field on the Manager page) . Enter short description (i.e. Progress, Construction, Pre-Bid, etc.) to allow easier searching from the Meeting Minutes Manager page. This field allows you to group meetings by subject (see page 1). Data entered in this field must be consistent! When next meeting is generated from this document (using Create Next button), do not change the Meeting Reference information.
- **Meeting #** will be automatically added but should be changed to match the next sequential number for the meeting type.
- If this is a **Revision**, change this number to the next revision number.

Project* 5240-N10-16-0AEN - 160AEN - NewG

Type* Progress

Meeting Reference* 001

Meeting #

Description Progress Meeting

Location

Reference

District 5240 - Union City (Hudson)

Meeting Date 05-02-2023

Status / Revision Draft

NEXT MEETING

Next Location

Meet Date 05-02-2023

Start

PARTICIPANTS

CONTACT	PRESENT
No records to display.	

1 PAGE SIZE 5

ADD PARTICIPANTS

- Click **Add** or **Add Multiple** to choose meeting participants. You can pick from the drop-down list or use the Search function.

PARTICIPANTS

Edit	Add	Add Multiple	Delete
CONTACT		PRESENT	
No records to display.			
◀◀ 1 ▶▶		PAGE SIZE 5 ▼	

ADD BUSINESS ITEMS

- Click **Add** on the **Details** tab to add assigned Business Items. Information includes Description of item, Assigned party, Due Date and Status. Click the **Save** button in the Details section after each entry

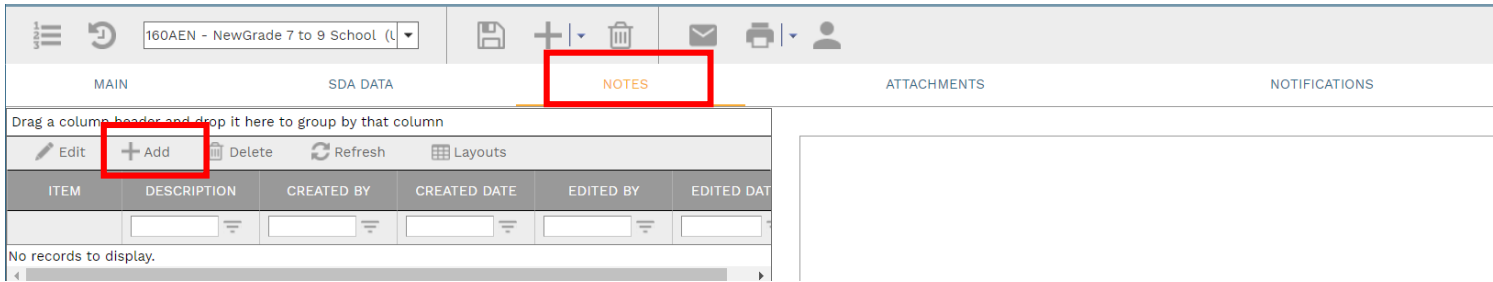
Drag a column header and drop it here to group by that column

Edit	Add	Delete	Refresh	Export To Excel	Paste From Excel	Layouts	
ITEM #	TOPIC	ATTACHMEN	DESCRIPTION	NOTES	ASSIGNED TO	DUE	COMPLETED
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
No records to display.							
◀◀ 1 ▶▶		PAGE SIZE 20 ▼					

IMPORTANT: When a Business Item is completed, edit the line item and enter the date in the **Completed** field. This means that when the next meeting is generated, this item will display as *Old Business*. If you want to remove this item from subsequent meeting minutes documents, **you must click the checkbox in the Done column** before generated the next meeting minute.

ADD ADDITIONAL NOTES

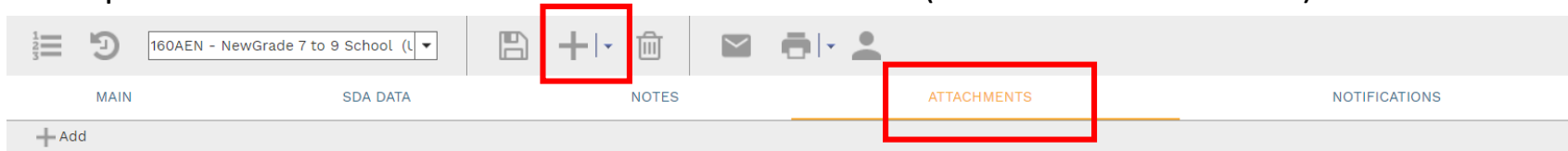
- Click **Add** on the **Notes** tab to add additional notes as needed. Click the **Save** button after each entry.



The screenshot shows a software interface with a top navigation bar containing icons for home, refresh, search, save, add, delete, email, print, and user. Below the navigation bar are tabs for MAIN, SDA DATA, **NOTES**, ATTACHMENTS, and NOTIFICATIONS. The **NOTES** tab is active. Below the tabs is a table with a toolbar containing 'Edit', '+ Add', 'Delete', 'Refresh', and 'Layouts'. The '+ Add' button is highlighted with a red box. The table has columns for ITEM, DESCRIPTION, CREATED BY, CREATED DATE, EDITED BY, and EDITED DATE. Below the table, it says 'No records to display.'

ADD ATTACHMENTS

- Drag and drop files on the **Attachments** tab to add attachments (or click the Add button). Click the **Save** button after each entry.



The screenshot shows the same software interface as above, but with the **ATTACHMENTS** tab selected. The '+ Add' button in the table toolbar is highlighted with a red box.

