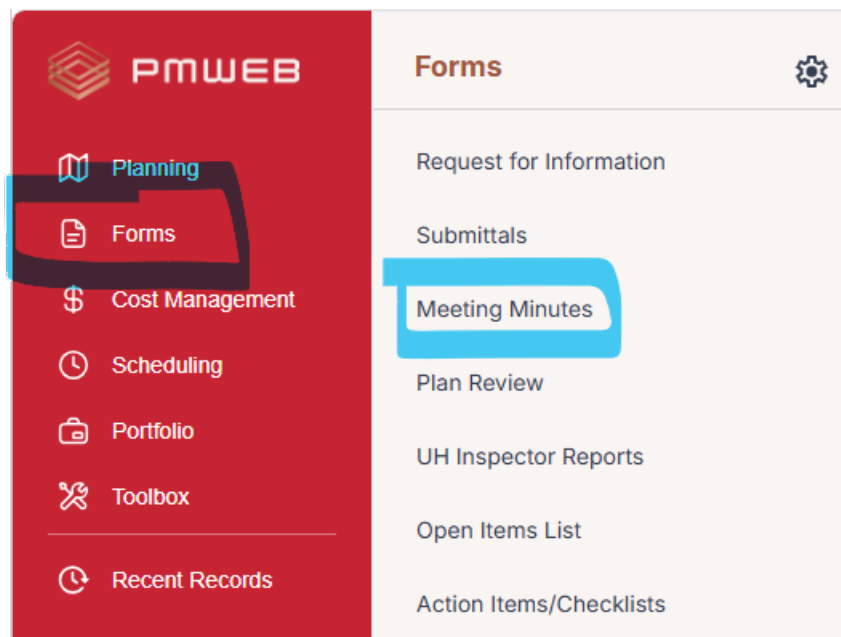


How to Use Meeting Minutes

Overview: PM Web provides a tool to record and share meeting minutes.

Reference: n/a

1. Click **Forms** from the buttons on the left and select **Meeting Minutes**.



2. Select **New Record**.

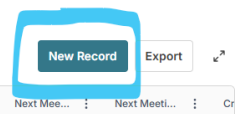
Meeting Minutes Manager

Manage, edit, and view your Meeting Minutes

Recently Viewed ▾

All Meeting Minutes

Group by: Project Name ▾ Layout: 701 TMC ▾



3. **Project** field – Select the project from the Project drop-down menu
4. **Description** field – Enter a brief descriptive explanation of the meeting.
5. **Type** field – Select the meeting type from the drop-down menu.
6. **Location** field – Enter location.
7. **Meeting Date** field – Enter meeting date.
8. **Started** field – Enter start time
9. **Ended** field – Enter end time
10. **If defined**, enter next location, meeting date and start time.
11. Click **Save**

Meeting Minutes (New) 11 Save

Main

Header Fields

Project* 3	Record #*	Meeting #	Description 4	Type 5
Location 6	Meeting Date 7	Started 8	Ended 9	Status Draft
Revision 0	Next Location 10	Meet Date 10	Start 10	User Assigned
User Due Date				

12. To add Participants to the meeting. Navigate to the **Participant** tab down the page and click '**Add Contacts**'. *Note: Only individuals who have PMWeb accounts will be able to be added.*

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Meeting Minutes: 1 - OAC Meeting Test

Create Next New Record Print

Main Notes Attachments Notifications

Participants

Group by: None Layout: System Default Layout New Line Add Contacts

Line #	Company	Contact	Participant	Present	Notes
No records available.					

0 - 0 of 0 << < > >> 250 Rows

13. A pop-up will appear. Select attendees as applicable and click **Save**.

Add Companies/Contacts

Companies/Contacts | Distribution Lists

Specs
View: ▼

Group by: None ▼ | Layout: System Default Layout ▼

	Company	Contact	Email	Type	Project
☒	E Contractors	Louie Cuellar	lcuellar@econtractors.com	07 - Vendor	
☒	E Contractors	Erin Frame	eframe@econtractors.com	07 - Vendor	
☒	E Contractors	Chris Gonzalez	cgonzalez@econtractors.com	07 - Vendor	
☐	E Contractors	Marcelo Perez	mperez@econtractors.com	07 - Vendor	
☐	E Contractors	Brandon Vazquez	bvazquez@econtractors.com	07 - Vendor	
☐	4b Technology Group	Justin Kowalke	j.kowalke@4btechnology.com		

1 - 250 of 559

3 Selected

Cancel **Save**

14. Click on the selected participants and select **Edit**. You can change status of Present or add notes as needed. Click **Save**.

Participants

Group by: None ▼ | Layout: System Default Layout ▼

New Line | Add Contacts | Delete | **Edit**

	Line #	Company	Contact	Participant	Present	Notes
☒	1	E Contractors	Chris Gonzalez		Yes	

1 - 3 of 3

Cancel **Save**

15. Navigate to the **Attachments** Tab. Add any attachments by dragging and dropping files into the noted location.

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Meeting Minutes: 1 - OAC Meeting Test

Create Next New Record Print ⋮

Main **Notes** **Attachments** Notifications

No attachments found

Select files...
Drop files here to upload

Add From Document Manager

16. To enter minutes or items to note, navigate to the Details section and click **New Line**.

Details

Group by: None Layout: Meeting Minutes Details - ...

New Line Export To Excel Paste From Excel

Item #	Attach...	Description	Assigned To	Category	Subject	Due	Completed	Notes	Done
No records available.									

0 - 0 of 0

20 Rows

17. Enter information in empty cells as needed and click **Save**. Repeat step 16 and 17 as needed.

Details

Group by: None Layout: Meeting Minutes Details - ...

Cancel **Save**

Item #	Attach...	Description	Assigned To	Category	Subject	Due	Completed	Notes	Done
(0)		Inter							

18. To send notifications to participants. Navigate to the **Notifications** tab and select **New Line**.

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Create Next
New Record
Print

Main
Notes
Attachments
Notifications

Group by: None
 Layout: System Default Layout

New Line

ID	Created Date	Created Time	Created by	Sent Date	Sent Time	Sent by	Reference	From	To Company	To Contact
No records available.										

0 - 0 of 0

250 Rows

19. A pop-up will appear. Add information as needed and click **Save**.

Notification

Message
Attachments
Options

From: Alexander Pena
 CC:

To:
 BCC:

Subject: Nick Merry Test - Meeting Minutes - 005
 Manual CC:

Message:
 Inter 14px B I U abc A

Notification:
 Project: Nick Merry Test
 Document Type: Meeting Minutes
 Document Number: 005
 Description: OAC Meeting Test

Cancel
Save

20. **Process complete.**

21. To create the meeting minutes for the subsequent related meeting, select **Create Next** and repeat steps starting at Step 3.

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Meeting Minutes: 1 - OAC Meeting Test

Create Next
New Record
Print

Main
Notes
Attachments
Notifications

Project*	Record #*	Meeting #	Description	Type