



Meetings Training Guide (Mentor)

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About

Meetings App allows users to set up, capture meeting information, and distribute minutes.

Process Overview

- Create meeting with attendees and agenda
- Attach Agenda and Sign in Portable View for Outlook Meeting Invite (outside CAMP)
- Meeting notes, items, attendance, and completion dates are recorded
- Meeting Minutes are distributed to attendees who can add comments
- Meeting Minutes are updated accordingly to the comments and can be distributed again
- After a certain amount of business days, no more comments can come in and meeting is finalized

Notes

- Create Pre-Construction, Job Progress, Coordination, and Bulletin Meetings
 - Pre-construction is a singular meeting
 - Job Progress, Coordination, Bulletin can be meeting series. For Job Progress, topics 1 to 11 need to be updated in meeting minutes.
- Items in a meeting series, may be copied into the next meeting in the series
- Able to view 3 portable views: Meeting Agenda, Meeting Sign in Sheet, and Meeting Minutes
- Distribute minutes to attendees, distribution list, or non-CAMP users with the ability to add attachments
- After the meeting is finalized, meeting minutes can always be distributed again if needed

Step-by-Step Instructions

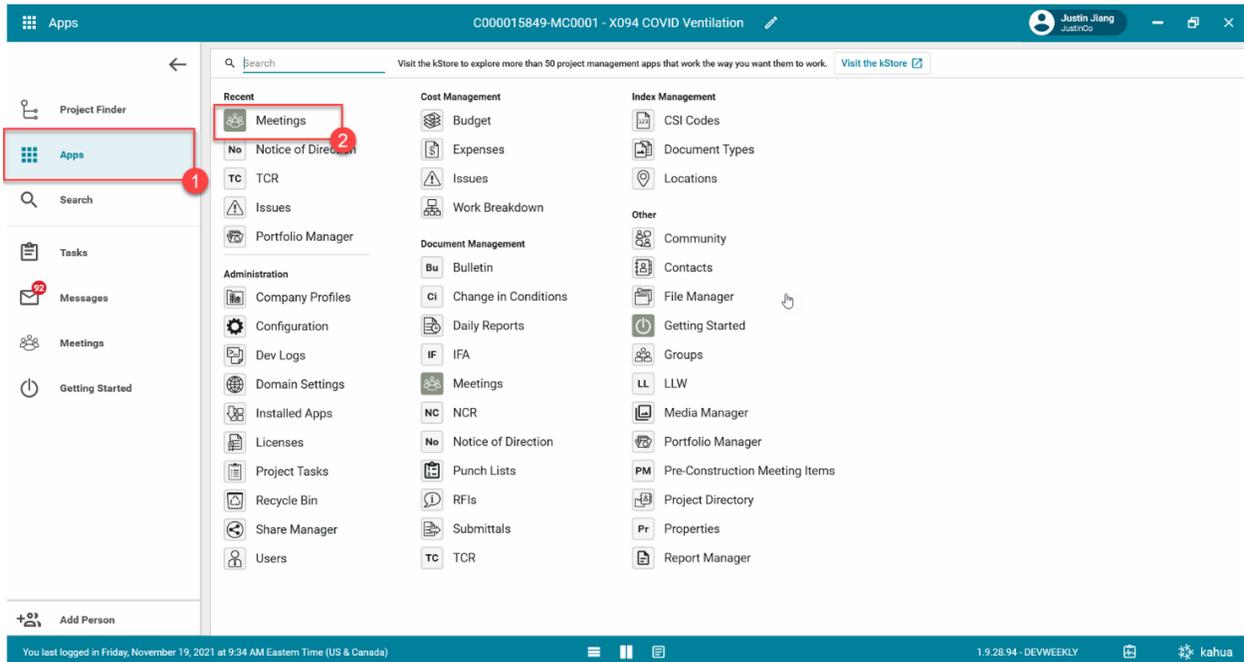
Pre-Construction Meeting

Create Meeting

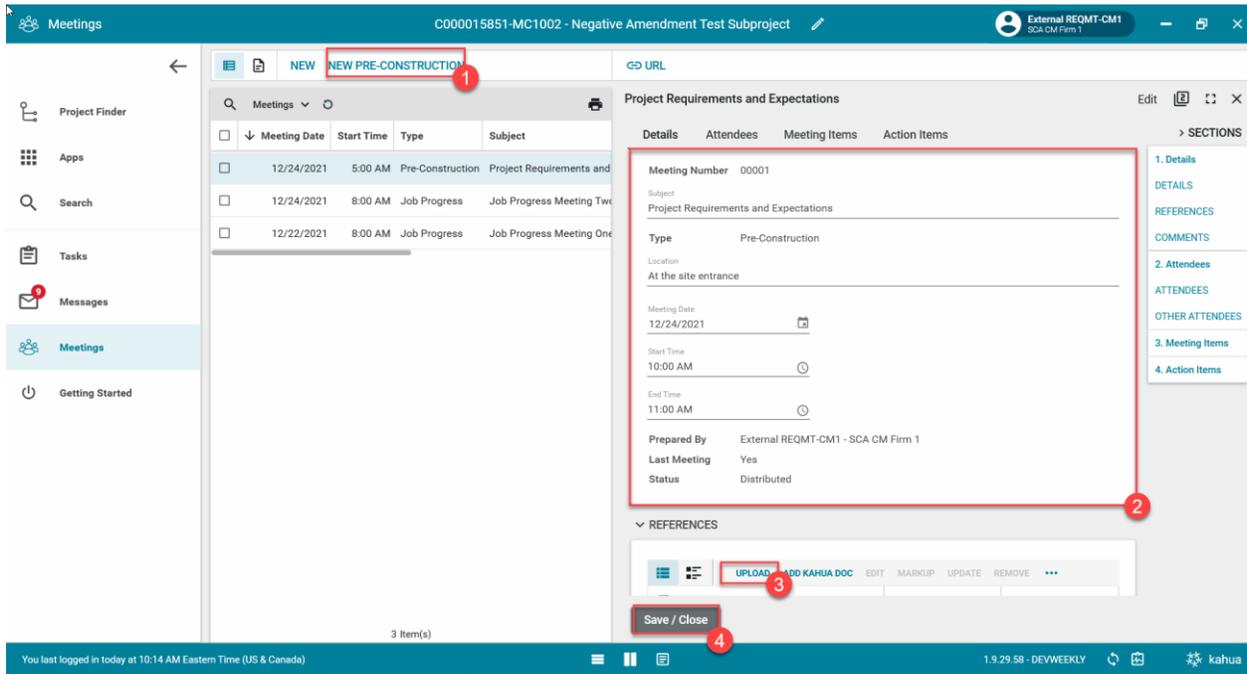
Role	Preceding Steps	Outcome
CM Firm	None	Pre-Construction meeting is created.

Steps

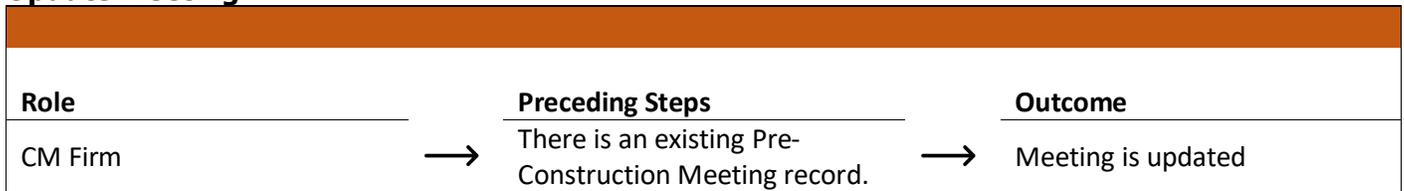
1. Go to 'Apps' > Select 'Meetings'



2. Select 'New Pre-Construction' > Enter details section. **Required Fields:** Subject, Type, Location, Meeting Date, and Start and End Time > Upload References > Select 'Save/Close'

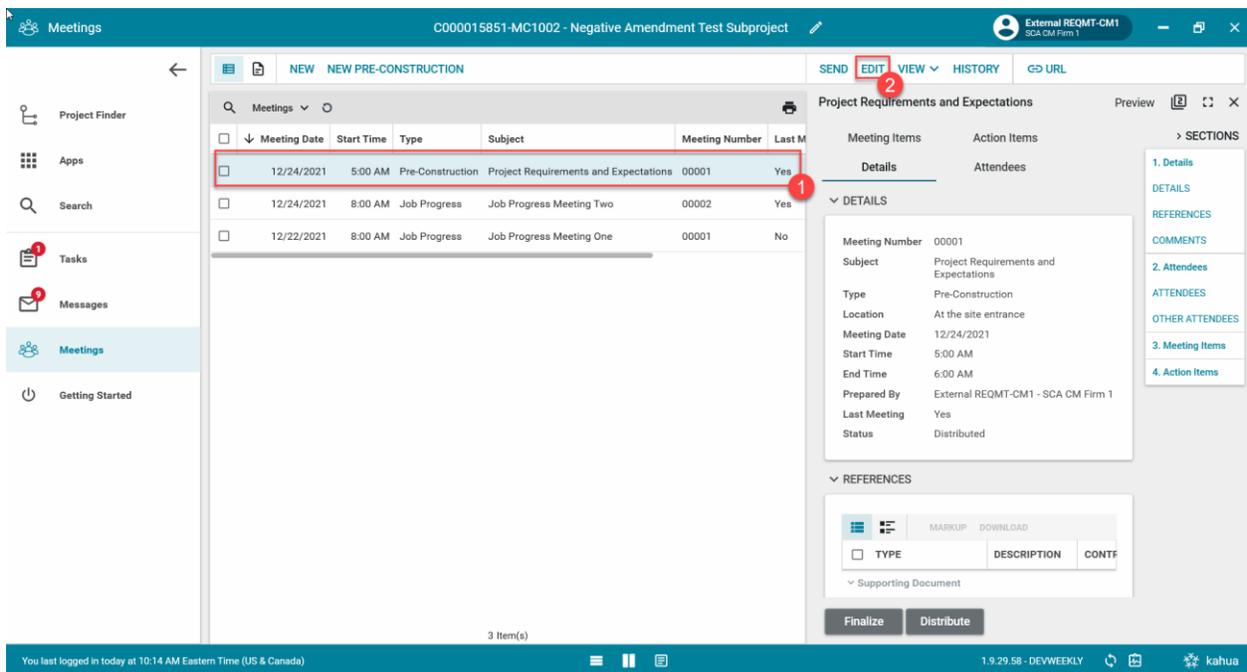


Update Meeting



Steps

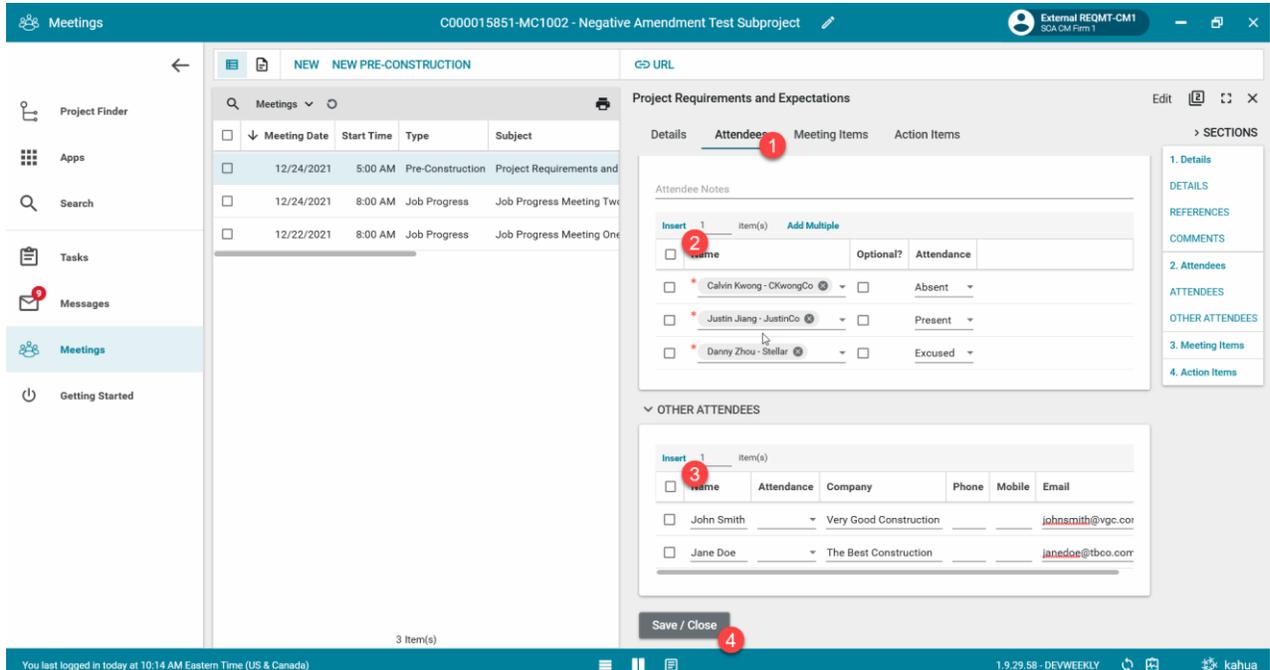
1. Select Meeting requiring updates > Select 'Edit'



2. Update **attendees** and meeting items in the appropriate tab and use pop out icons > Select Attendees > Add

Other Attendees > Select 'Save/Close'

Note: The Meeting Items Agenda is already prepopulated for Pre-Construction



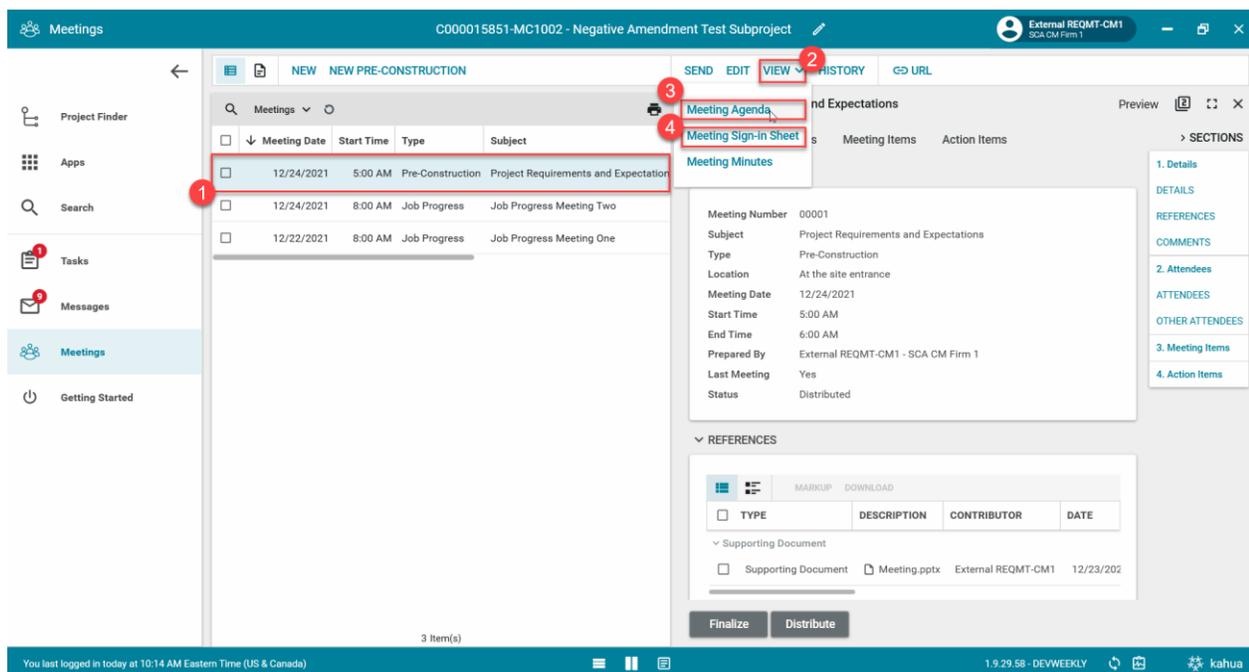
View Meeting Agenda and Sign In Portable Views for Outlook Meeting Invite



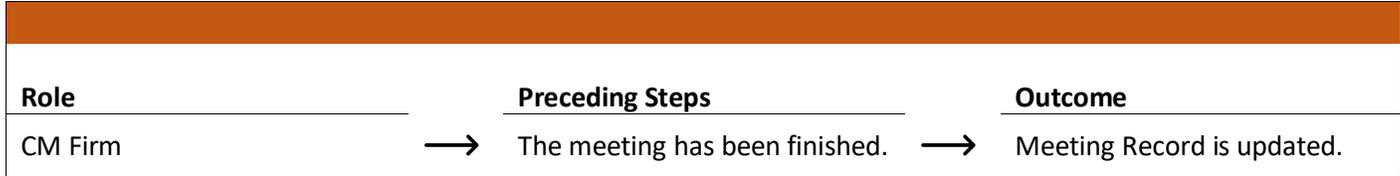
Steps

1. Select Desired Meeting Record > Select 'View' > Select 'Meeting Agenda' or Select 'Meeting Sign-in Sheet'

Note: Cm Firm can attach Agenda and Sign in PVs to Outlook Meeting Invite (**Outside Camp**)

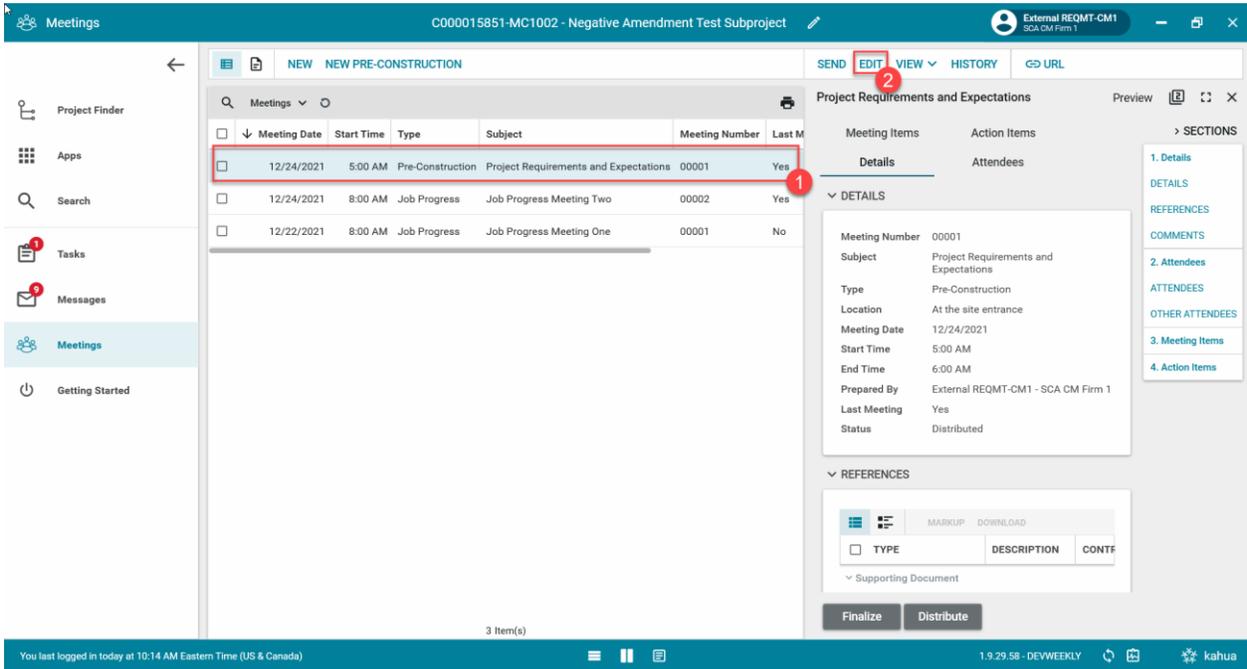


Update Meeting Details and Attendance

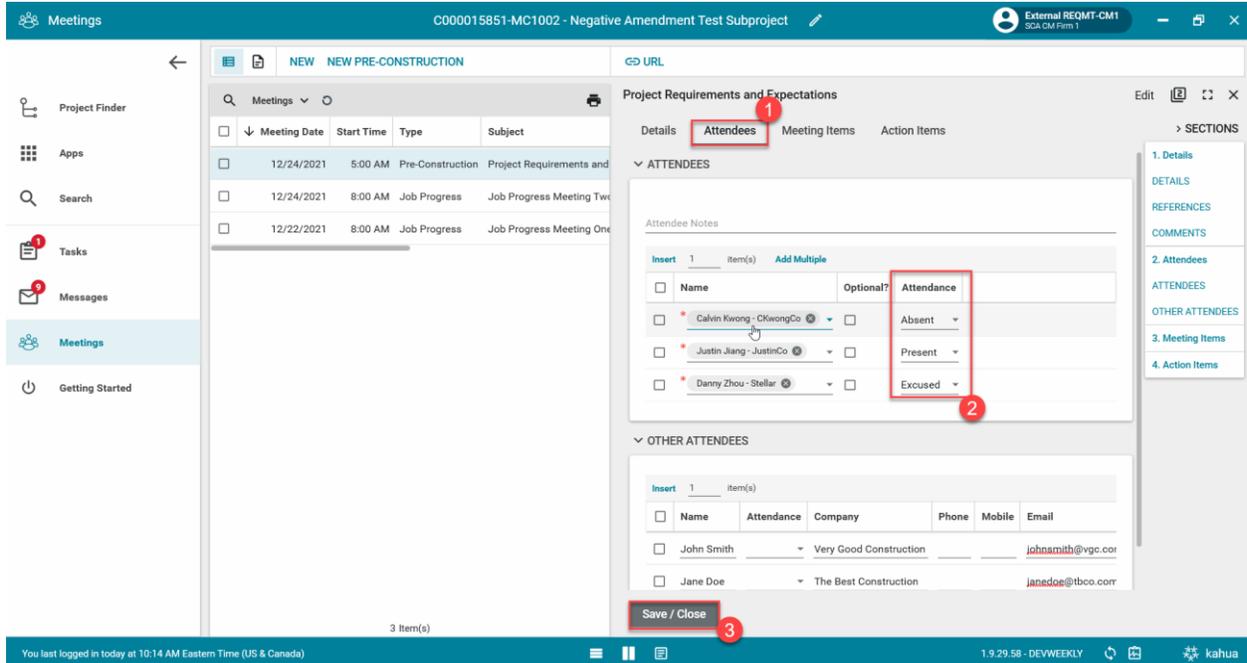


Steps

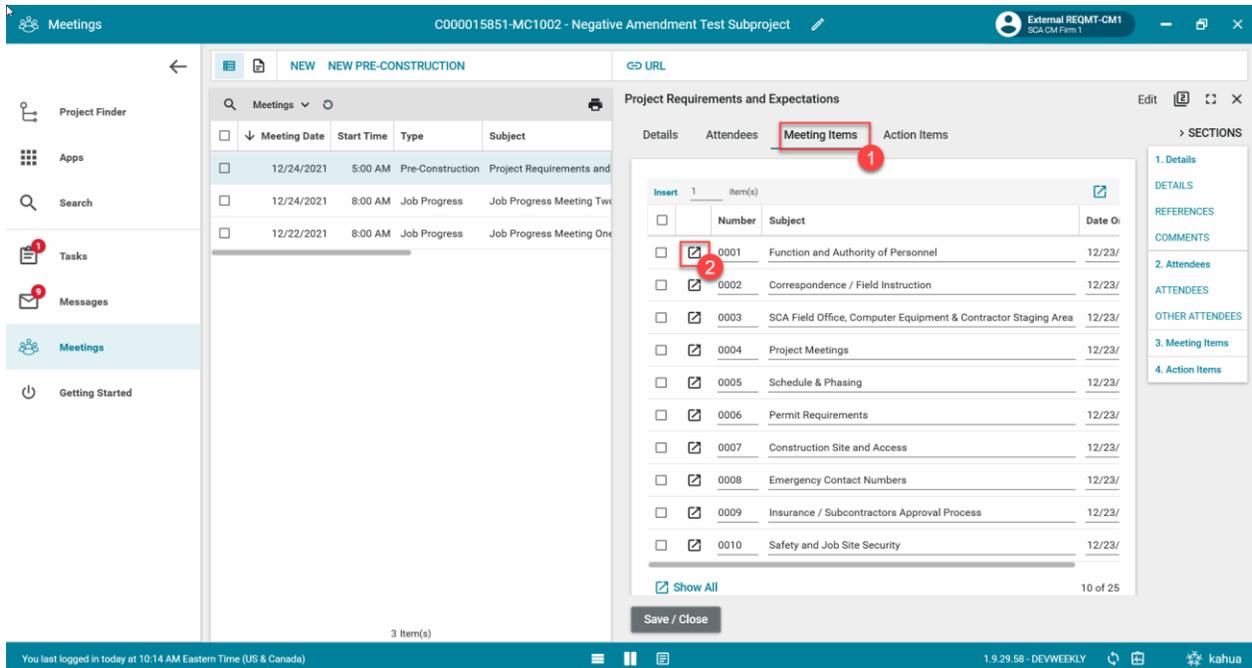
1. Select Meeting requiring updates > Select 'Edit'



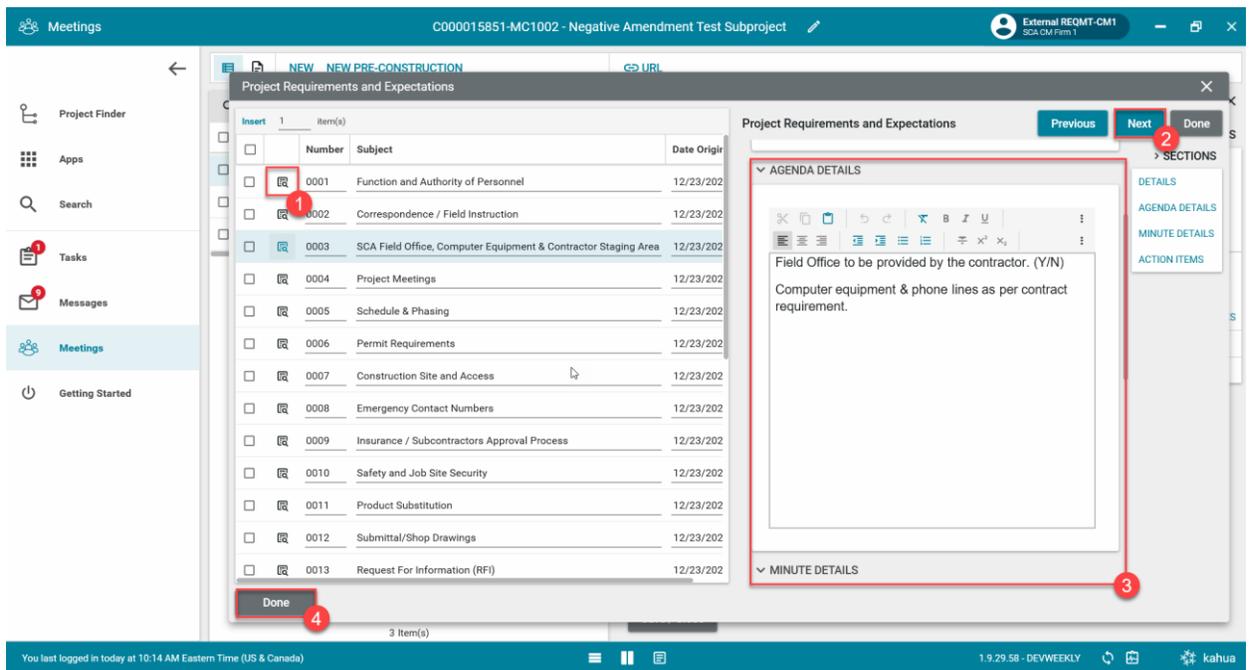
2. Go to the Attendees Tab > Update the Attendance > Select 'Save/Close'



3. Go to Meeting Items Tab > Select the Pop Out icon



4. Select the Pop Out Button > Select 'Next' to Navigate to Complete records > Manually copy items from agenda details into Minute Details and update according to the meeting > Select 'Done'



View Meeting Minutes Portable View

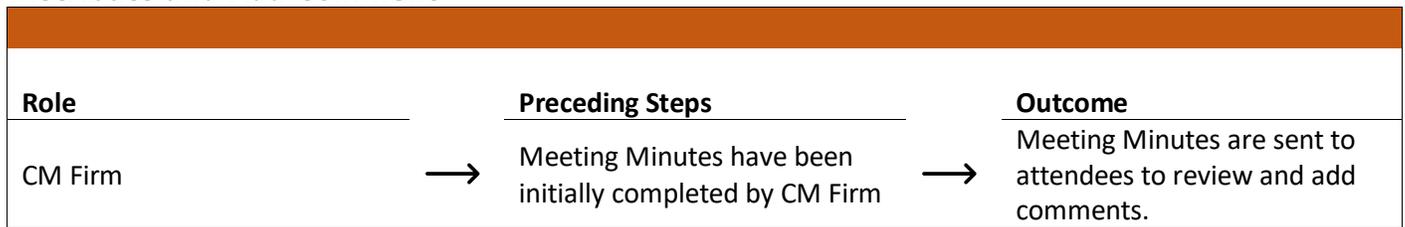
Role	Preceding Steps	Outcome
CM Firm	→ Meeting Minutes is updated	→ View the Meeting Meetings

Steps

1. Select Desired Meeting Record > Select View > Select Meeting Minutes (portable view)

The screenshot shows the 'Meetings' application interface. The top navigation bar includes 'NEW', 'NEW PRE-CONSTRUCTION', 'SEND', 'EDIT', 'VIEW', 'HISTORY', and 'URL'. The main content area displays a list of meeting records with columns for 'Meeting Date', 'Start Time', 'Type', and 'Subject'. A red box highlights the first record: '12/24/2021 5:00 AM Pre-Construction Project Requirements and...'. A red circle '1' is placed over this record. To the right, the 'Meeting Minutes' view is displayed, showing a table with columns for 'Number', 'Subject', and 'Date Original'. A red box highlights the 'VIEW' dropdown menu, and a red circle '2' is placed over it. A red circle '3' is placed over the 'Meeting Minutes' option in the dropdown menu. The bottom status bar shows 'You last logged in today at 10:14 AM Eastern Time (US & Canada)' and '1.9.29.58 - DEVWEEKLY'.

Distribute and Add Comment

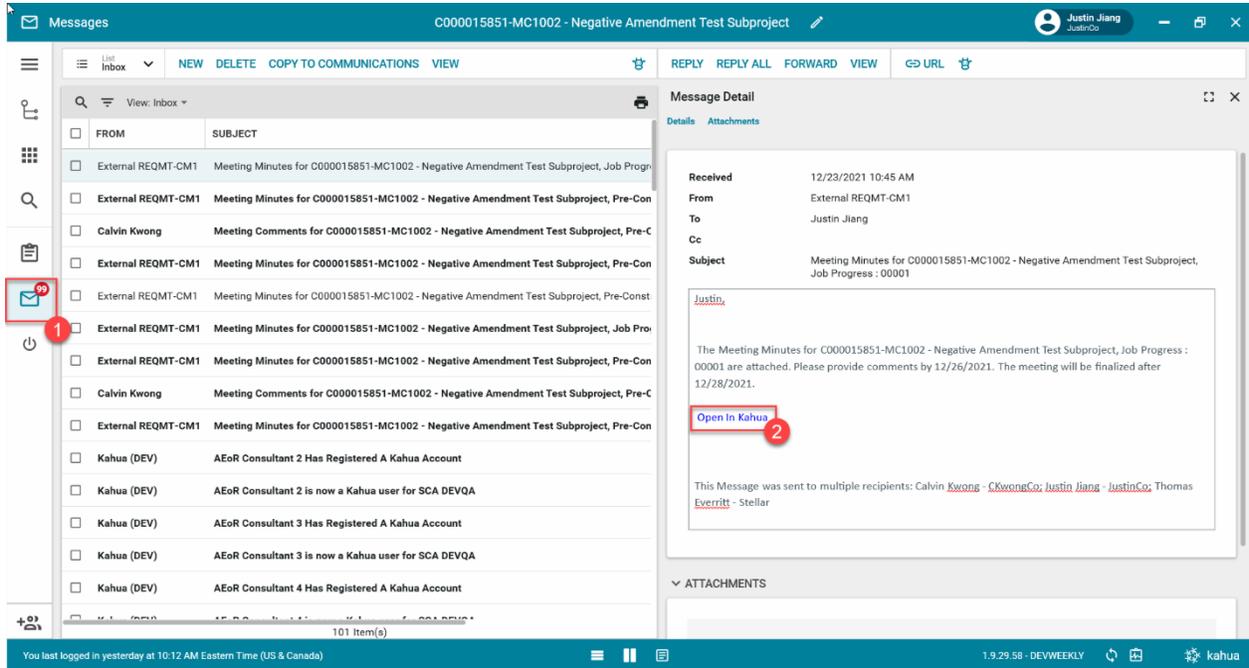


Steps

1. Select Meeting requiring distribution > Select 'Distribute'

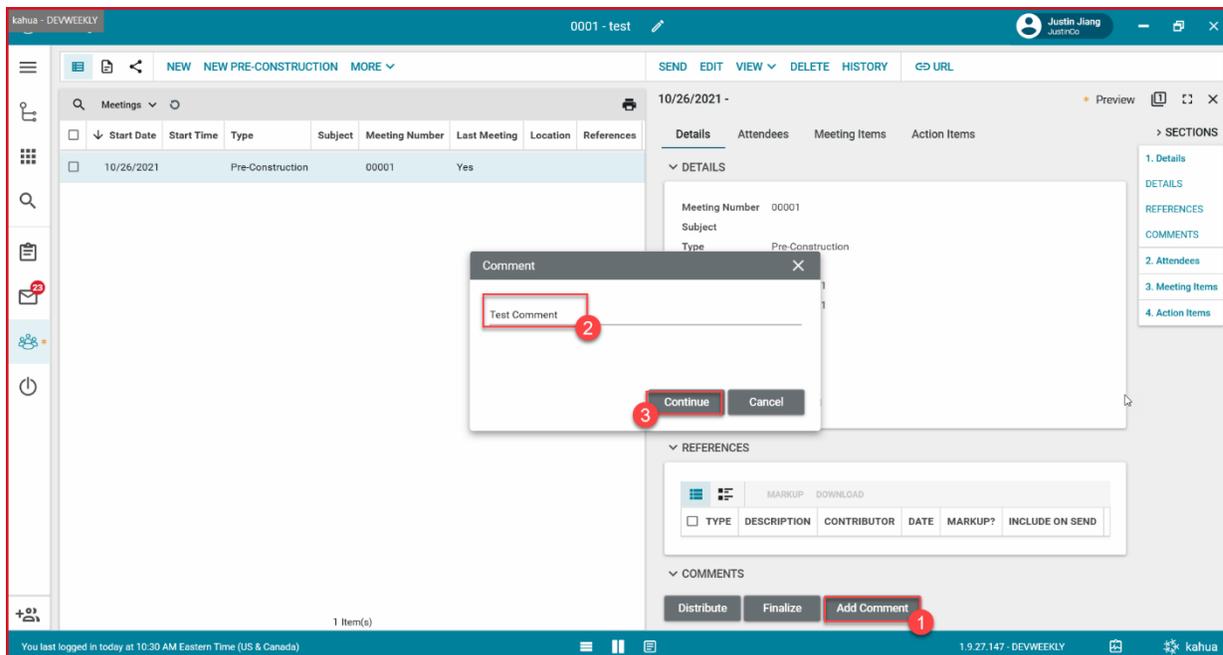
The screenshot shows the 'Meetings' application interface. The top navigation bar includes 'NEW', 'NEW PRE-CONSTRUCTION', 'SEND', 'EDIT', 'VIEW', 'HISTORY', and 'URL'. The main content area displays a list of meeting records with columns for 'Meeting Date', 'Start Time', 'Type', and 'Subject'. A red box highlights the first record: '12/24/2021 5:00 AM Pre-Construction Project Requirements and...'. A red circle '1' is placed over this record. To the right, the 'Meeting Minutes' view is displayed, showing a table with columns for 'Number', 'Subject', and 'Date Original'. A red box highlights the 'Distribute' button at the bottom of the view. A red circle '2' is placed over this button. The bottom status bar shows 'You last logged in today at 10:14 AM Eastern Time (US & Canada)' and '1.9.29.58 - DEVWEEKLY'.

1. Attendees go to Message > Select 'Open In Kahua'



2. Attendees select 'Add Comment' > Type Comment > Select 'Continue'

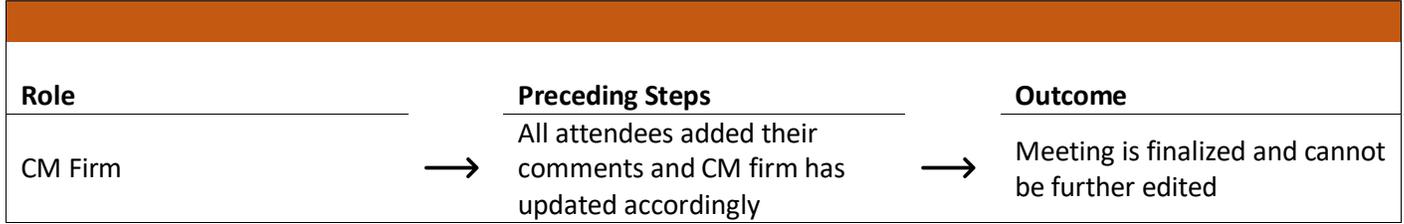
Note. All CAMP User attendees can add comments. Other Attendees are not CAMP Users.



CM Firm updates Meeting Minutes according to comments and distributes.

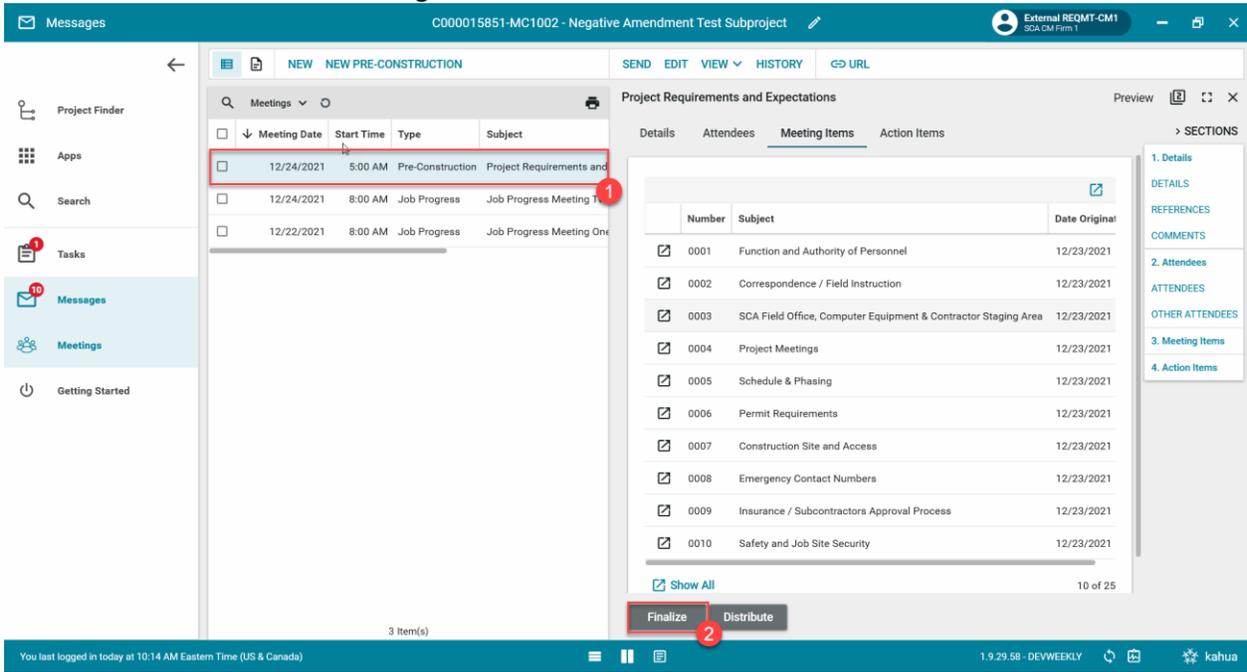
Note: Update Meeting Minutes and Distribute Steps Shown above

Finalize and Unlock

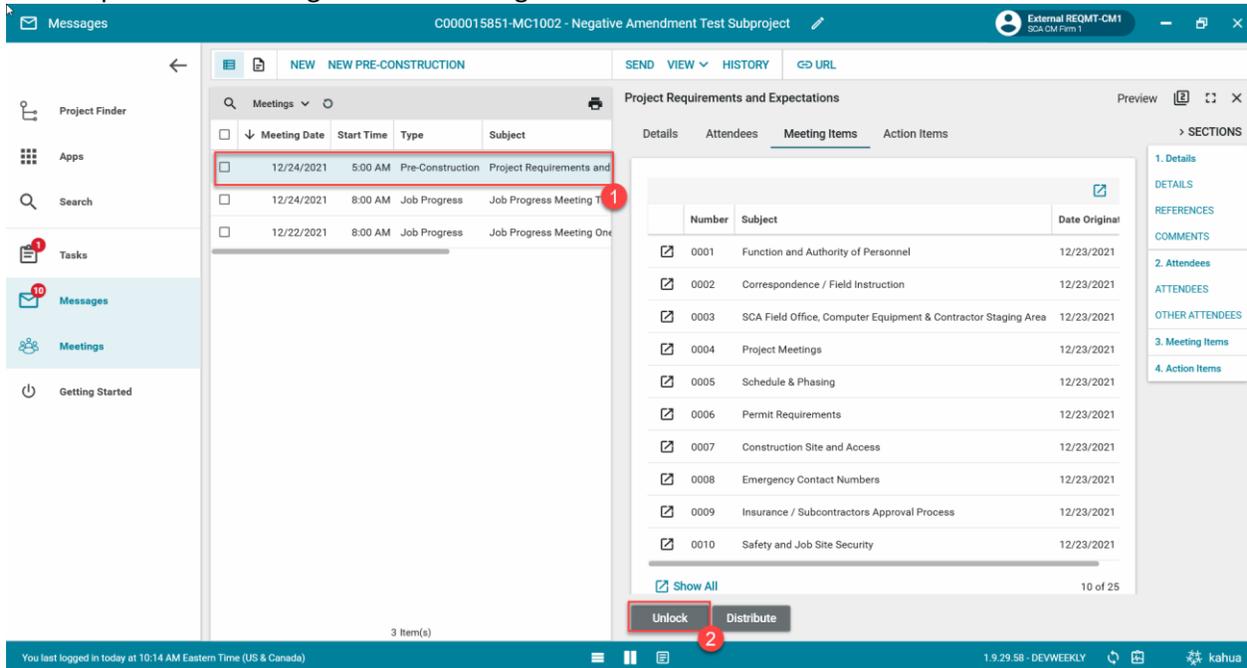


Steps

1. Select Meeting requiring finalizing > Click 'Finalize'
- Note. Can still distribute after finalizing.



2. Select Meeting requiring unlock > Click 'Unlock'
- Note: Can update the Meeting and distribute again.



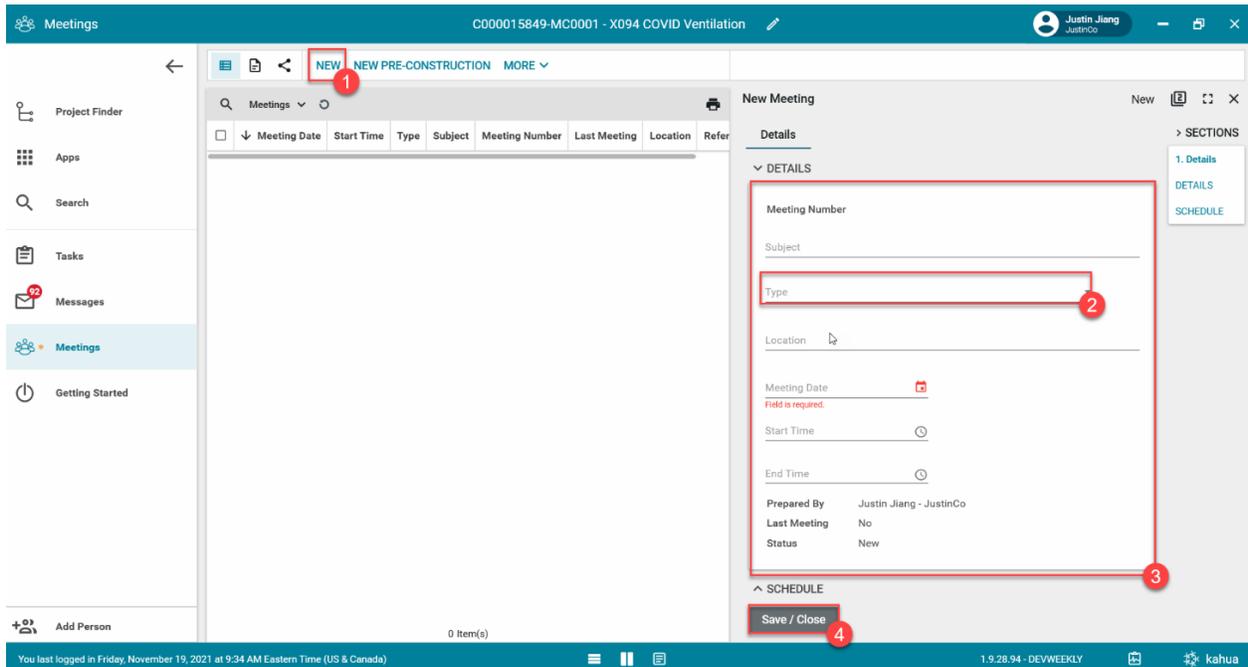
Job Progress, Bulletin, and Coordination Meeting Series

Create First Meeting in the Series

Role	Preceding Steps	Outcome
CM Firm	→ None	→ New Job Progress/ Bulletin/ Coordination Meeting Record created.

Steps

1. Select 'New' > Select Type: 'Job Progress' or 'Bulletin' or 'Coordination' > Enter Details **Required Field:** Subject, Type, Location, Meeting Date, and Start and End Time > Select 'Save/Close'



Populate Attendees and Agenda

Role	Preceding Steps	Outcome
CM Firm	→ There is existing Job Progress, Bulletin, or Coordination type record.	→ Populate Attendees and Agenda.

Steps

1. Select Meeting requiring updates > Select 'Edit'

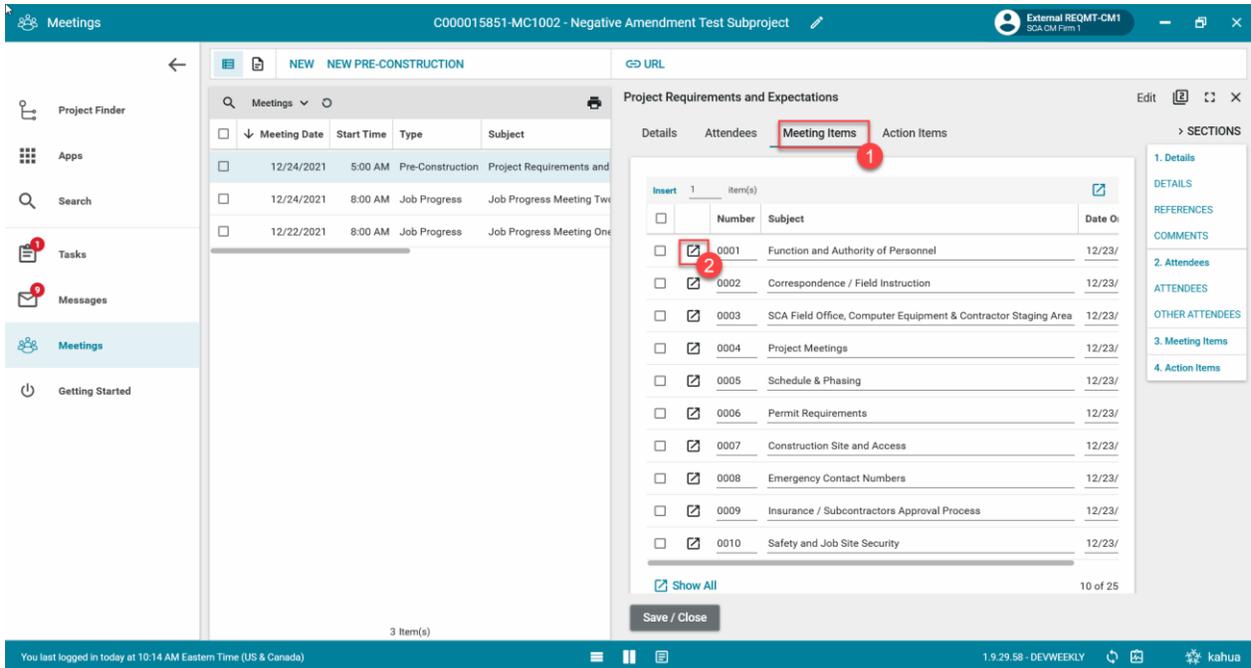
The screenshot shows the 'Meetings' application interface. On the left is a navigation sidebar with options like Project Finder, Apps, Search, Tasks, Messages, Meetings, and Getting Started. The main area displays a list of meetings with columns for Start Date, Start Time, Type, Subject, Location, and Part of Series?. A red box highlights the 'Edit' button in the top right corner. Another red box highlights a meeting row in the list with the following details: Start Date: 8/19/2021, Start Time: 9:00 AM, Type: Job Progress, Subject: Weekly Job Progress Meeting, Location: Field Office, Part of Series?: Yes. The right pane shows the details for the selected meeting, including Subject, Type, Location, Start/End Dates, and Prepared By information.

Update attendees and meeting items in the appropriate tab.

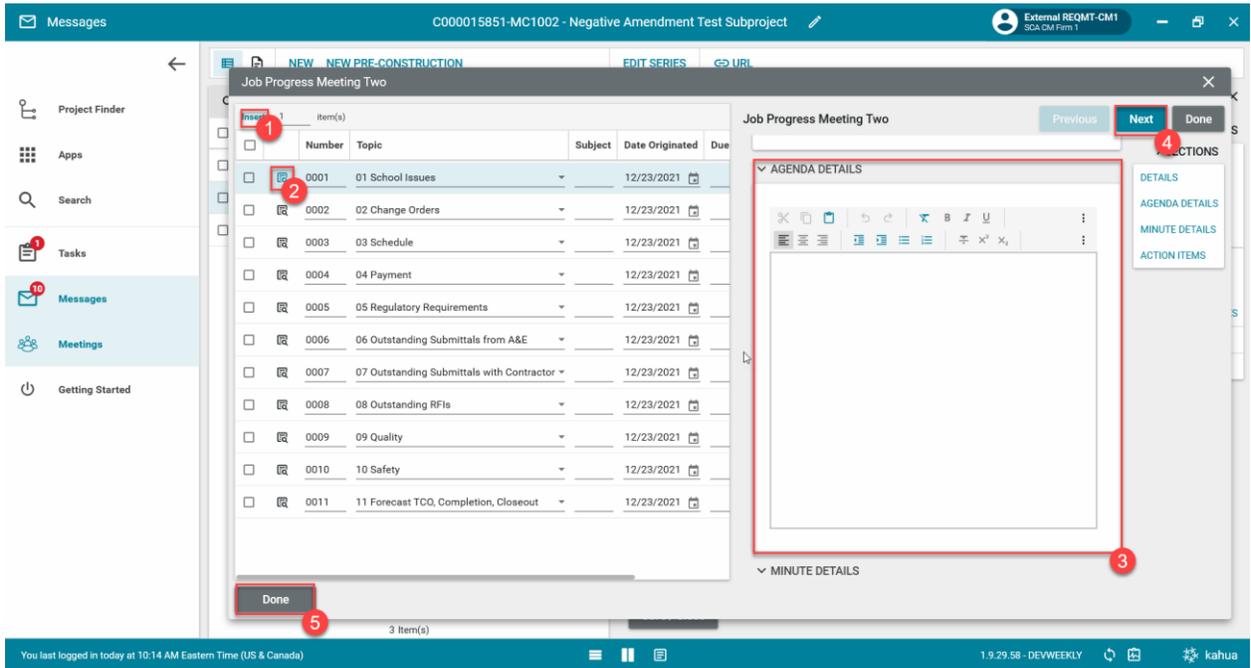
1. Select Attendees tab > Select Attendees > Enter Other Attendee information > Select 'Save/Close'

The screenshot shows the 'Meetings' application interface with the 'Attendees' tab selected. The top bar indicates the meeting title 'C000015851-MC1002 - Negative Amendment Test Subproject' and the user 'External REQMT-CM1 SCA CM Firm 1'. The main area displays a list of meetings with columns for Meeting Date, Start Time, Type, and Subject. A red box highlights the 'Attendees' tab in the top right. Another red box highlights the 'Name' field in the 'Attendee Notes' section. A third red box highlights the 'Attendance' dropdown menu. A fourth red box highlights the 'Save / Close' button at the bottom. The 'Attendee Notes' section shows a table with columns for Name, Attendance, Company, Phone, Mobile, and Email. The 'Other Attendees' section shows a table with columns for Name, Attendance, Company, Phone, Mobile, and Email.

2. Go to Meeting Items Tab > Select the Pop Out icon



3. Select Insert and Insert Topics. **Note.** Topics 1 through 11 are mandatory for Job Progress meetings. > Select the Pop Put Button > Enter the Agenda Details > Select 'Next' to Finish the rest of the Topics > Select 'Done'



View Meeting Agenda and Sign In Portable Views for Outlook Meeting Invite

Role	Preceding Steps	Outcome
CM Firm	→ Meeting Record is updated	→ View the agenda and sign-in

Steps

1. Select Desired Meeting Record > Select 'View' > Select 'Meeting Agenda' or Select 'Meeting Sign-in Sheet

Note: CM Firm can attach Agenda and Sign in PVs to Outlook Meeting Invite (**Outside Camp**)

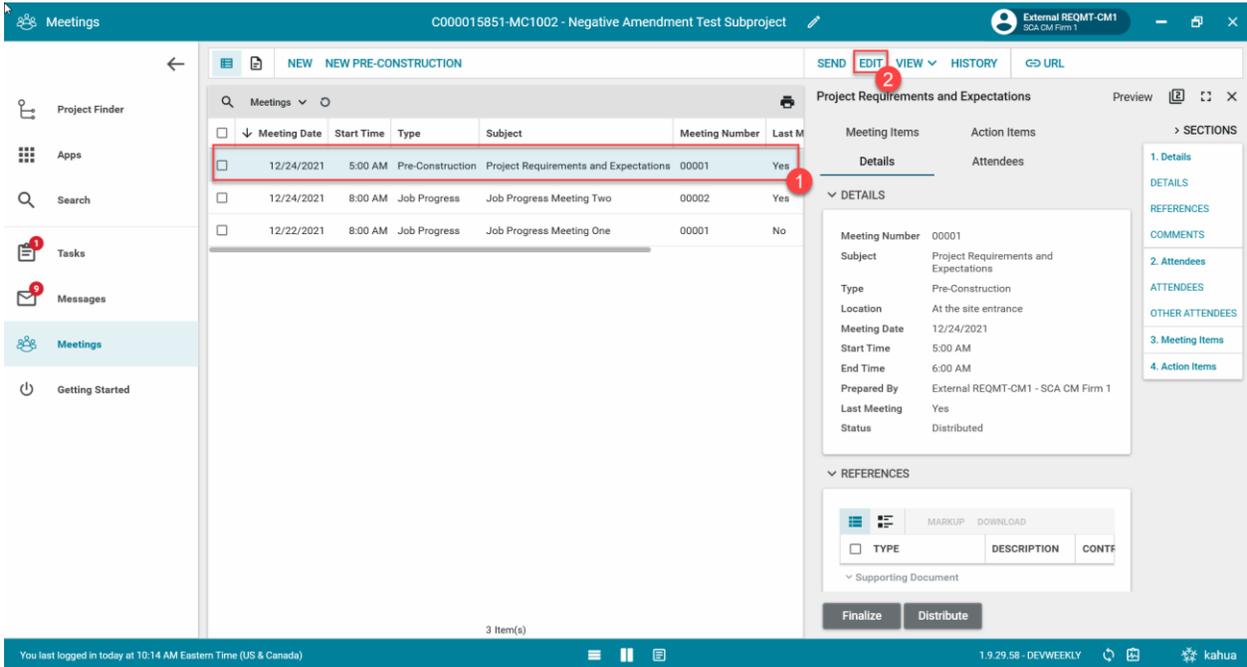
The screenshot shows the 'Meetings' application interface for a project named 'C000015851-MC1002 - Negative Amendment Test Subproject'. The user is logged in as 'External REQMT-CM1 - SCA CM Firm 1'. The interface includes a sidebar with navigation options like Project Finder, Apps, Search, Tasks, Messages, Meetings, and Getting Started. The main area displays a list of meeting records with columns for Meeting Date, Start Time, Type, and Subject. A meeting record for '12/24/2021 5:00 AM Pre-Construction Project Requirements and Expectations' is selected. A 'VIEW' dropdown menu is open, showing options for 'Meeting Agenda', 'Meeting Sign-in Sheet', and 'Meeting Minutes'. The details panel on the right shows meeting information such as Meeting Number (00001), Subject (Project Requirements and Expectations), Type (Pre-Construction), Location (At the site entrance), Meeting Date (12/24/2021), Start Time (5:00 AM), End Time (6:00 AM), Prepared By (External REQMT-CM1 - SCA CM Firm 1), Last Meeting (Yes), and Status (Distributed). A 'REFERENCES' section at the bottom shows a supporting document 'Meeting.pptx' attached to the meeting.

Update Meeting Details and Attendance

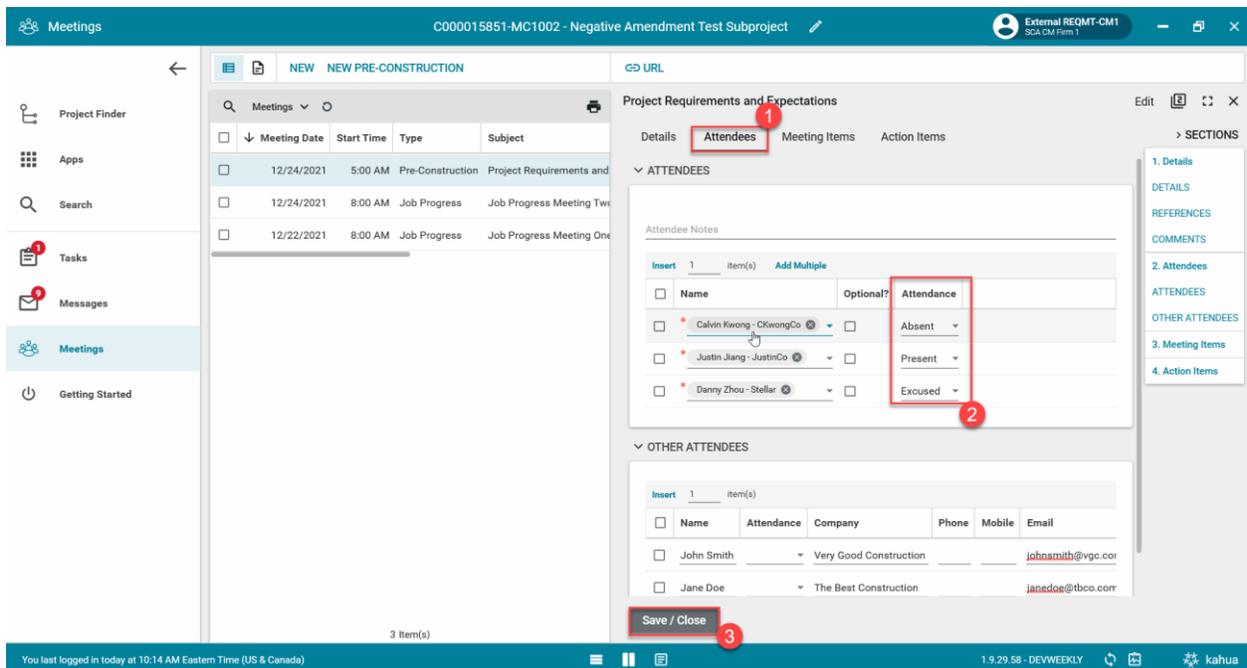


Steps

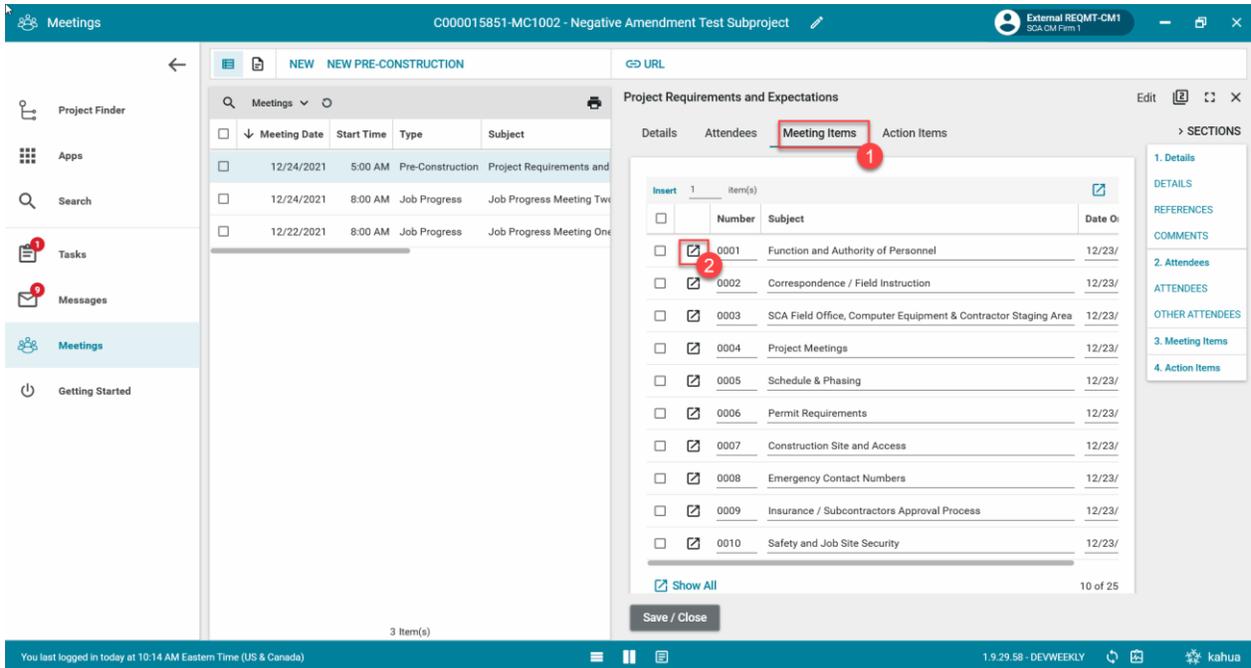
1. Select Meeting requiring updates > Select 'Edit'



2. Go to the Attendees Tab > Update the Attendance > Select 'Save/Close'

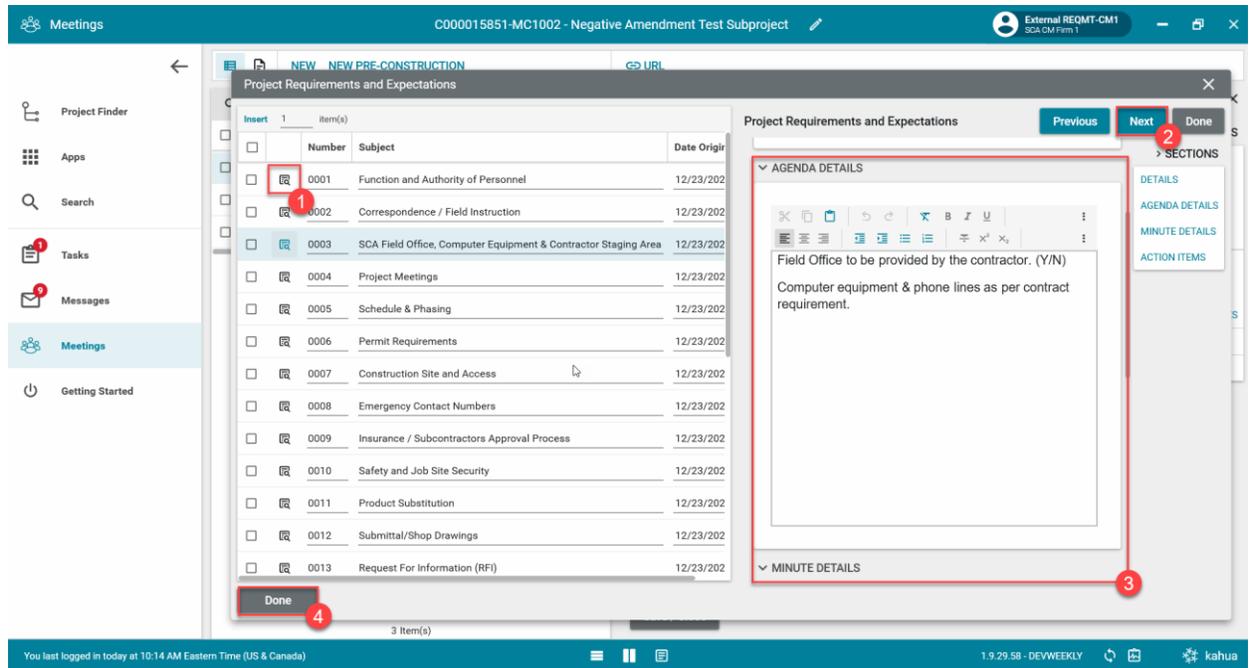


3. Go to Meeting Items Tab > Select the Pop Out icon



4. Select the Pop Out Button > Select 'Next' to Navigate between items > Manually copy items from Agenda Details into Minute Details and update according to meeting > Select 'Done'

Note: For Job Progress meetings, topics 1 to 11 are mandatory. If there is no discussion, enter NA in the Meeting Details.



View Meeting Minutes Portable View

Role	Preceding Steps	Outcome
CM Firm	→ Meeting Minutes is updated	→ View the Meeting Meetings

Steps

1. Select desired Meeting record > Select 'View' > Select 'Meeting Minutes'

The screenshot shows the 'Meetings' application interface. The main content area displays a list of meeting records. A red box labeled '1' highlights a meeting record with the subject 'Project Requirements and...'. A dropdown menu is open over this record, with a red box labeled '2' highlighting the 'VIEW' option. A second dropdown menu is open over 'VIEW', with a red box labeled '3' highlighting the 'Meeting Minutes' option. The interface also shows a sidebar with navigation options like 'Project Finder', 'Apps', 'Search', 'Tasks', 'Messages', 'Meetings', and 'Getting Started'. The top bar includes the project name 'C000015851-MC1002 - Negative Amendment Test Subproject' and user information 'External REQMT-CM1 SCA CM Firm 1'. The bottom status bar shows the login time and version '1.9.29.58 - DEVWEEKLY'.

Distribute and Add Comment

Role	Preceding Steps	Outcome
CM Firm	→ Meeting Minutes have been initially completed by CM Firm	→ Meeting Minutes are sent to attendees to review and add comments.

Steps

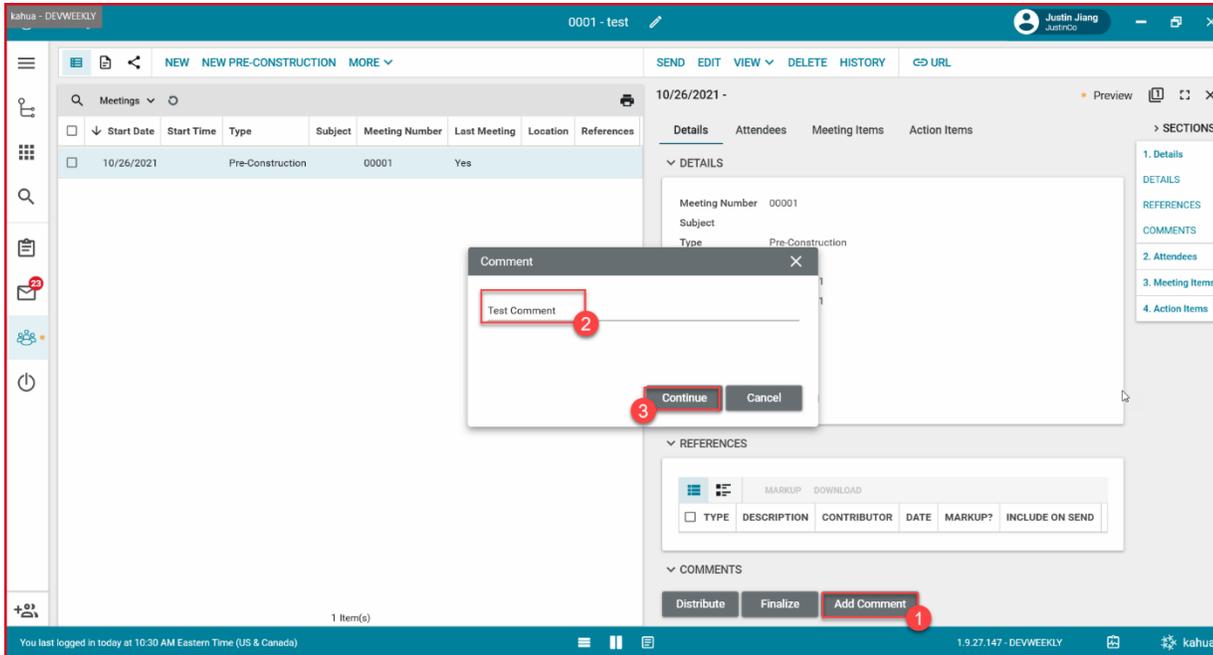
1. Select Meeting requiring distribution > Select 'Distribute'

The screenshot shows the 'Meetings' application interface for project 'C000015851-MC1002 - Negative Amendment Test Subproject'. The left sidebar contains navigation options: Project Finder, Apps, Search, Tasks, Messages, Meetings (selected), and Getting Started. The main area displays a table of meetings with columns for Meeting Date, Start Time, Type, and Subject. The first row is highlighted with a red box and a red circle '1'. Below the table, there are 'Finalize' and 'Distribute' buttons, with the 'Distribute' button highlighted by a red box and a red circle '2'. The right pane shows 'Project Requirements and Expectations' with a list of items (0001-0010) and a 'Show All' link.

2. Attendees go to Message > Select 'Open In Kahua'

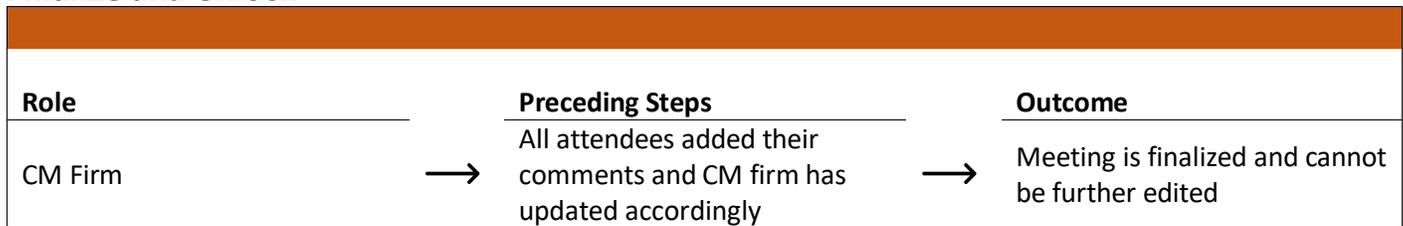
The screenshot shows the 'Messages' application interface for project 'C000015851-MC1002 - Negative Amendment Test Subproject'. The left sidebar contains navigation options: Messages (selected), Project Finder, Apps, Search, Tasks, Messages, Meetings, and Getting Started. The main area displays a list of messages with columns for FROM and SUBJECT. The first message is highlighted with a red box and a red circle '1'. The right pane shows 'Message Detail' for a message received on 12/23/2021 at 10:45 AM from External REQMT-CM1 to Justin Jiang. The message content includes meeting minutes and a link to 'Open In Kahua', which is highlighted with a red box and a red circle '2'. The bottom of the interface shows the status bar with the time 1:9:29.58 - DEVWEEKLY and the Kahua logo.

- Attendees select 'Add Comment' > Type Comment > Select Continue
- Note. All CAMP User attendees can add comments. Other Attendees are not CAMP Users.



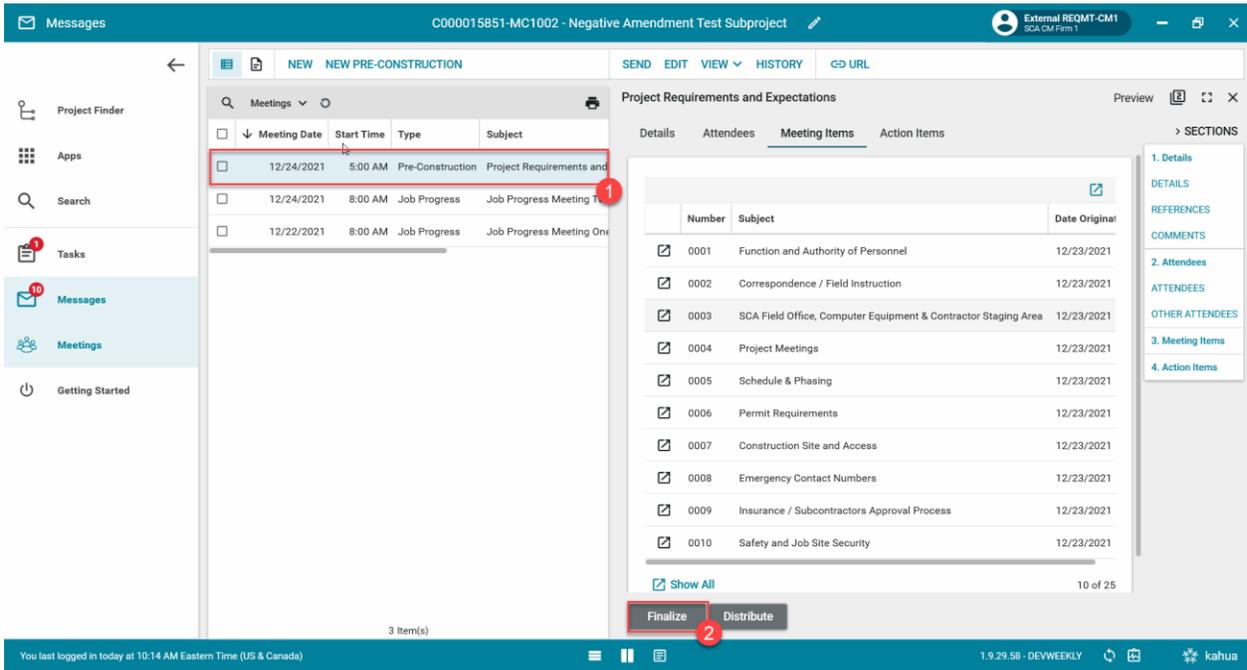
CM Firm updates Meeting Minutes according to comments and distributes again.
Note: Update Meeting Minutes and Distribute Steps Shown above.

Finalize and Unlock

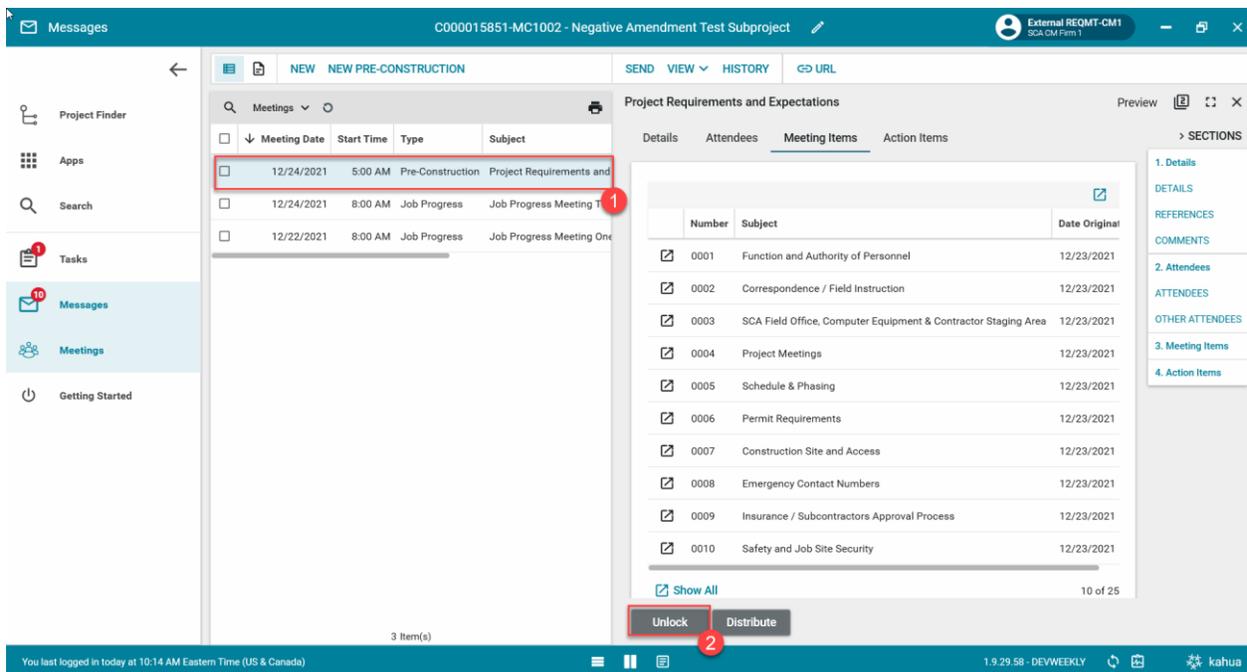


Steps

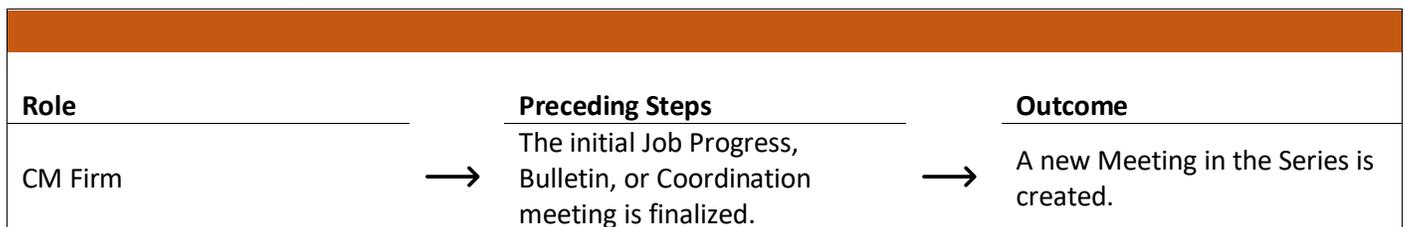
- Select Meeting requiring finalizing > Click 'Finalize'
- Note.** Can still distribute after finalize.



2. Select Meeting requiring unlock > Click 'Unlock'
Note: Can Update the Meeting and Distribute again.



Create New Meetings in a Series



Steps

1. Click on desired record > Select Edit Series

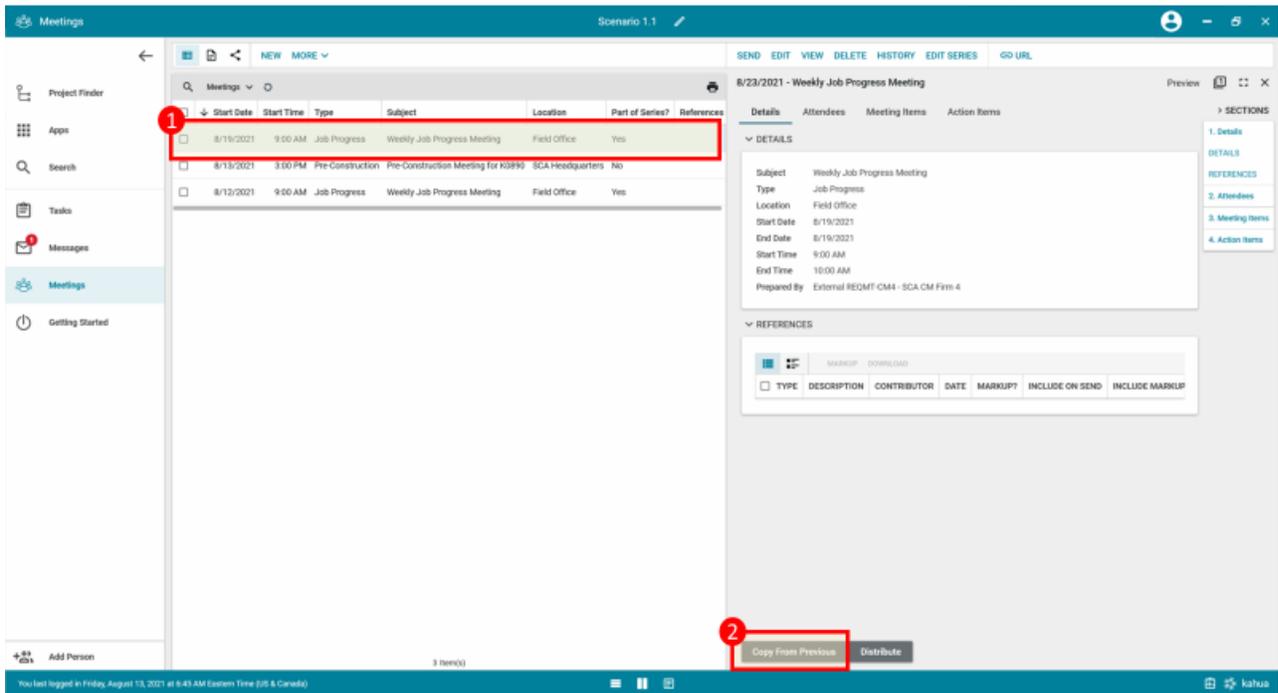
The screenshot shows the kahua interface for a meeting series. The top navigation bar includes 'SEND', 'EDIT', 'VIEW', 'DELETE', 'HISTORY', 'EDIT SERIES' (highlighted with a red circle and '1'), and 'URL'. Below the navigation bar, there is a table of meetings with columns for Start Date, Start Time, Type, Subject, Meeting Number, Last Meeting, Location, and References. The table shows two meetings on 10/26/2021, one with Type 'Progress' and Meeting Number '00001', and another with Type 'Pre-Construction' and Meeting Number '00001'. To the right of the table is a detailed view for the selected meeting, including fields for Meeting Number, Subject, Type, Location, Start Date, End Date, Start Time, End Time, Prepared By, Last Meeting, and Status. The 'EDIT SERIES' button is highlighted with a red circle and the number 1.

2. Read and Verify the Warning Message on top > Enter Meeting Date > Select 'Add Meeting'

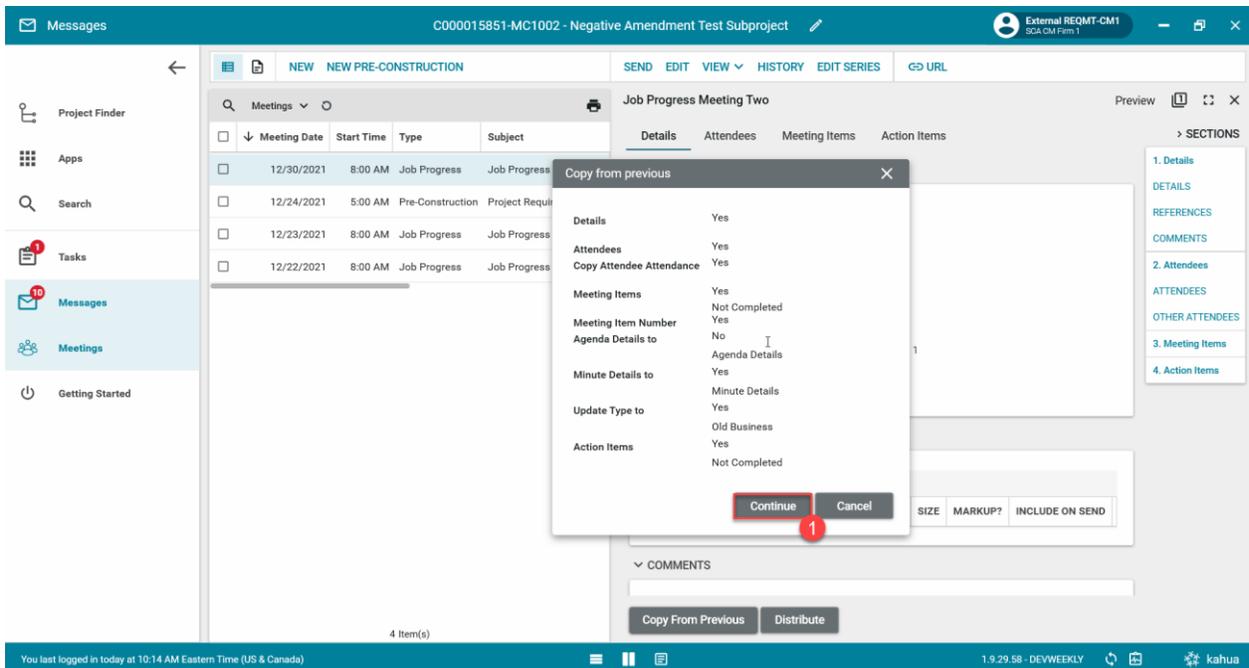
The screenshot shows the kahua interface for a meeting series. The top navigation bar includes 'NEW', 'NEW PRE-CONSTRUCTION', and 'URL'. Below the navigation bar, there is a table of meetings with columns for Meeting Date, Start Time, Type, and Subject. The table shows three meetings on 12/24/2021, 12/23/2021, and 12/22/2021, all with Type 'Pre-Construction' and Meeting Number '00001'. To the right of the table is a detailed view for the selected meeting, including fields for Meeting Number, Subject, Type, Location, Meeting Date, Start Time, End Time, and Prepared By. A warning message is displayed at the top of the detailed view: 'If you changed specific meetings in the series that are scheduled to occur after today, your changes will be discarded and those meetings will match the series again. Meetings in this series taking place before today's date will not be affected.' The 'Meeting Date' field is highlighted with a red circle and the number 2. The 'Add Meeting' button is highlighted with a red circle and the number 3.

Copy information from the previous Meeting in the series to the current Meeting.

3. Select last Meeting > Select 'Copy from Previous'



4. Select 'Continue'



Update Meeting as needed.

5. Select Meeting requiring updates > Select 'Edit'

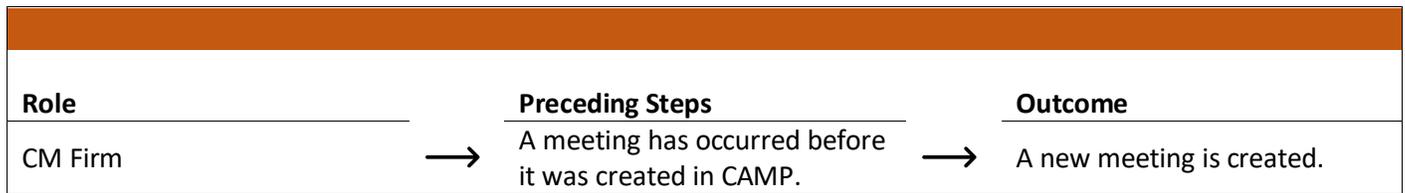
The screenshot shows a software interface with a sidebar on the left containing navigation options: Project Finder, Apps, Search, Tasks, Messages (with a red notification badge), Meetings, and Getting Started. The main area is titled 'Messages' and 'C000015851-MC1002 - Negative Amendment Test Subproject'. A table of meetings is displayed with columns for Meeting Date, Start Time, Type, and Subject. The first row, '12/30/2021 8:00 AM Job Progress Job Progress Meeting Two', is highlighted with a red border. Above the table, the 'EDIT' button is highlighted with a red box. To the right, the 'Job Progress Meeting Two' details are visible, including Meeting Number (00003), Subject (Job Progress Meeting Two), Type (Job Progress), Location (SCA), Meeting Date (12/30/2021), Start Time (8:00 AM), End Time (9:00 AM), Prepared By (External REQMT-CM1 - SCA CM Firm 1), Last Meeting (Yes), and Status (New). A 'SECTIONS' menu on the far right lists: 1. Details, REFERENCES, COMMENTS; 2. Attendees, ATTENDEES, OTHER ATTENDEES; 3. Meeting Items; 4. Action Items.

6. Go to Details Section > Make updates > Select 'Save/Close'

This screenshot shows the 'Job Progress Meeting Two' details page. The 'DETAILS' tab is selected and highlighted with a red box and a red '1'. The form fields are: Meeting Number (00003), Subject (Job Progress Meeting Three), Type (Job Progress), Location (SCA), Meeting Date (12/30/2021), Start Time (1:00 PM), and End Time (2:00 PM). The 'Prepared By' field is 'External REQMT-CM1 - SCA CM Firm 1', 'Last Meeting' is 'Yes', and 'Status' is 'New'. A red box and a red '2' highlight the entire details form area. At the bottom of the form, the 'Save / Close' button is highlighted with a red box and a red '3'. The sidebar and top navigation are consistent with the previous screenshot.

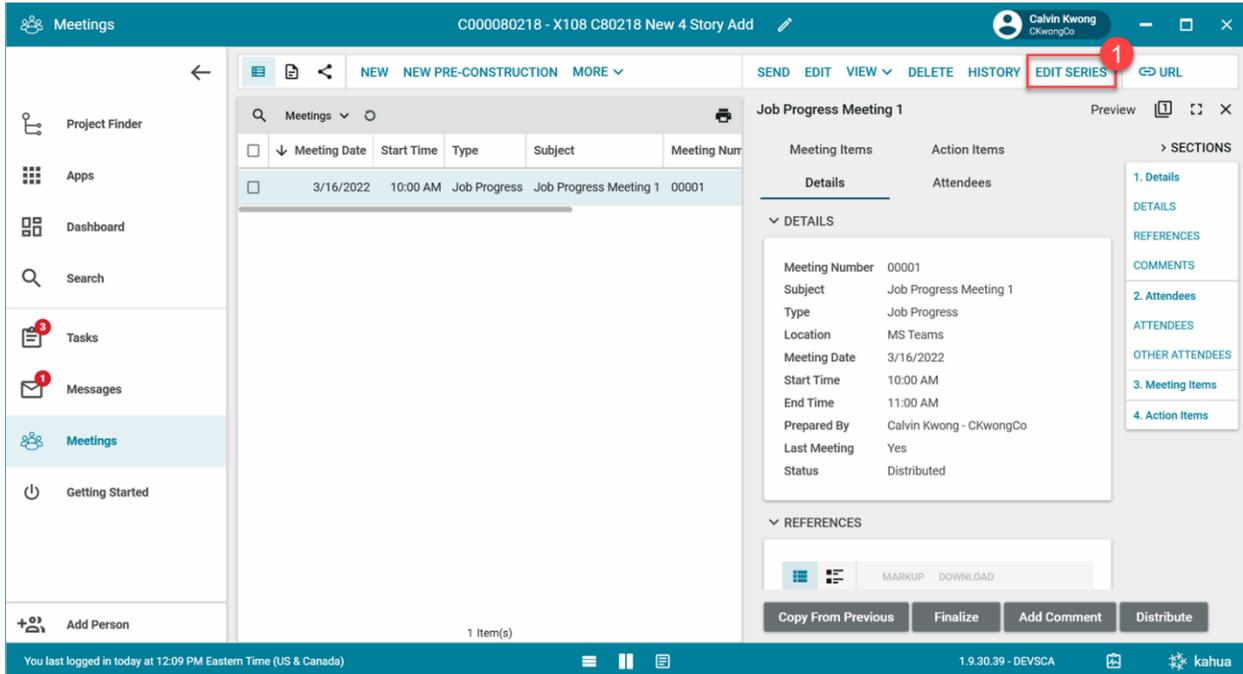
Note: Populate Attendees and Agenda Section of Job Progress, Bulletin, and Coordination Meeting Series to continue creating the meeting. The steps are the same. With this, you will be able to create new meetings in the series.

Create Meetings in the Past

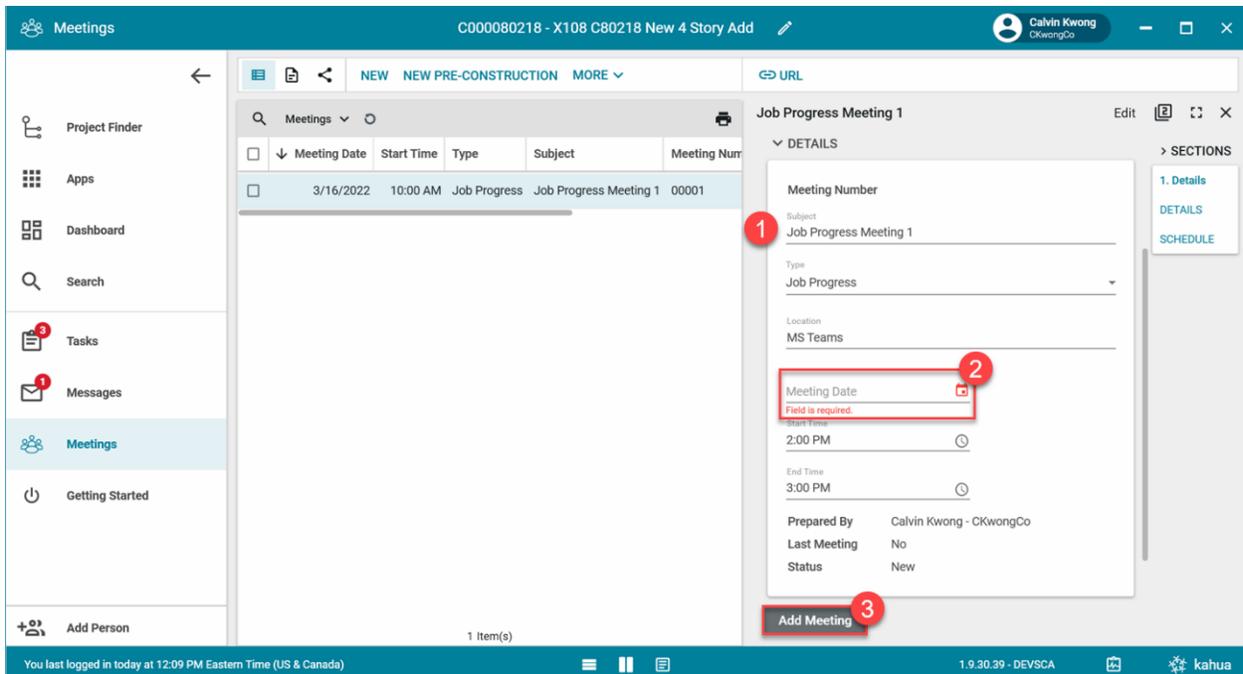


Steps

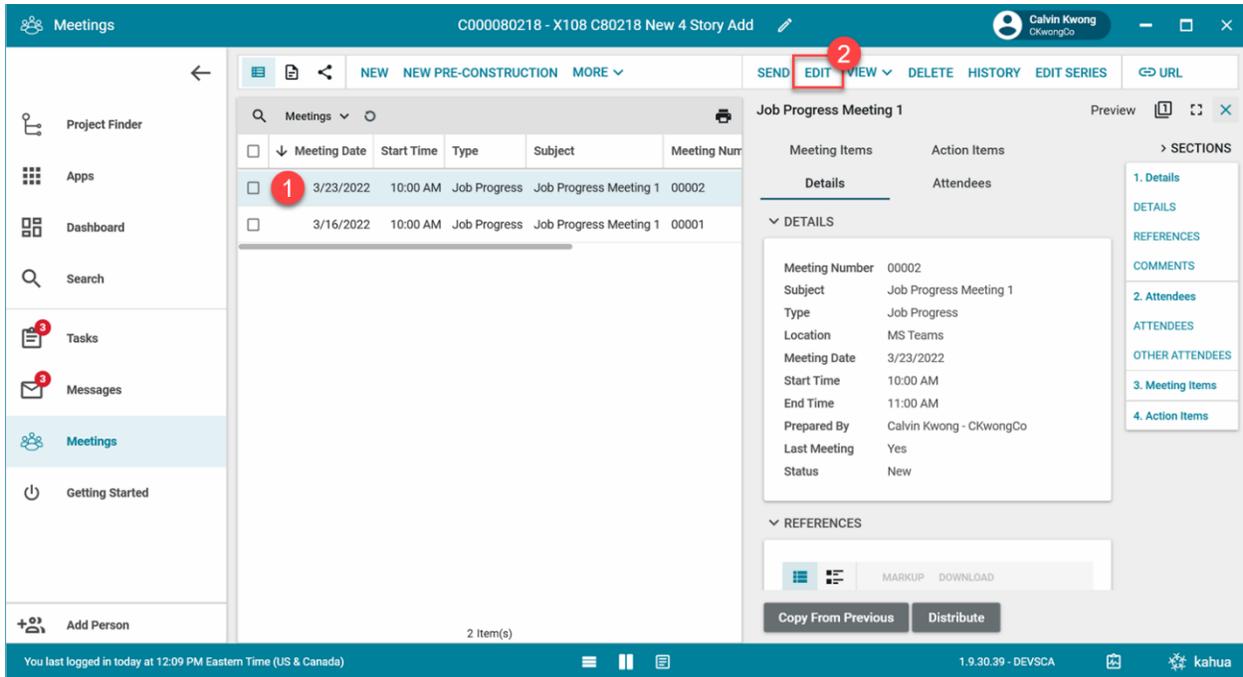
1. Create a new meeting from 'New', 'New Pre-Construction', or 'Edit Series' button



2. Enter fields in the Details section > Select a 'Meeting Date' that is not in the past > Select 'Save/Close' or 'Add Meeting'



3. Select the newly created meeting > Select 'Edit'



4. Change the 'Meeting Date' to the desired date > Select 'Save/Close'