

Meetings Training Guide (Mentor)

Date Created: 8/2/2021 Date Updated: 6/1/2022

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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	\rightarrow	None	\rightarrow	Pre-Construction meeting is created.

Steps

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

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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

Role	Preceding St	eps	Outcome
CM Firm	There is an e Construction	$\xrightarrow{\text{xisting Pre-}} \longrightarrow$	Meeting is updated

Steps

1. Select Meeting requiring updates > Select 'Edit'

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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

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

Role	_	Preceding Steps	_	Outcome
CM Firm	\rightarrow	Meeting Record is updated	\rightarrow	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)**



Update Meeting Details and Attendance

Role	_	Preceding Steps	_	Outcome
CM Firm	\rightarrow	The meeting has been finished.	\rightarrow	Meeting Record is updated.

Steps

1. Select Meeting requiring updates > Select 'Edit'

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

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

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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'

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View Meeting Minutes Portable View

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

Steps

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



Distribute and Add Comment

Role	Precedin	ng Steps		Outcome
CM Firm	→ Meeting initially c	Minutes have been completed by CM Firm	\rightarrow	Meeting Minutes are sent to attendees to review and add comments.

Steps

1. Select Meeting requiring distribution > Select 'Distribute'

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

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

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

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

Finalize and Unlock

Role		Preceding Steps		Outcome
CM Firm	\rightarrow	All attendees added their comments and CM firm has updated accordingly	\rightarrow	Meeting is finalized and cannot be further edited

Steps

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

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2. Select Meeting requiring unlock > Click 'Unlock'

Note: Can update the Meeting and distribute again.

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Job Progress, Bulletin, and Coordination Meeting Series

Create First Meeting in the Series

Role		Preceding Steps		Outcome
	_			New Job Progress/ Bulletin/
CM Firm	\rightarrow	None	\rightarrow	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'

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Populate Attendees and Agenda

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

Steps

1. Select Meeting requiring updates > Select 'Edit'



Update attendees and meeting items in the appropriate tab.

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

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								Jane Doe The Best Construction Janedoe@tbco.com	
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2. Go to Meeting Items Tab > Select the Pop Out icon

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2 0010 Safety and Job Site Security	12/23/
Show All	10 of 25
Save / Close	
3 Item(s)	

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'

	Messages						C000015851-MC100	2 - Negativ	e Amendment 1	Fest S	ubproject 🧨	External REQMT- SCA CM Firm 1	CM1 _	ð ×	
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View Meeting Agenda and Sign In Portable Views for Outlook Meeting Invite

Role		Preceding Steps		Outcome
CM Firm	\rightarrow	Meeting Record is updated	\rightarrow	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)**

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Update Meeting Details and Attendance

Role	_	Preceding Steps	_	Outcome
CM Firm	\rightarrow	The meeting has been finished.	\rightarrow	Meeting Record is updated.

Steps

1. Select Meeting requiring updates > Select 'Edit'



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

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	Name Attendance Company Phone Mobile Email	
	John Smith Very Good Construction <u>johnsmith@vgc.cor</u>	
	□ Jane Doe v The Best Construction Janedoe@tbco.com	
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3. Go to Meeting Items Tab > Select the Pop Out icon

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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.

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View Meeting Minutes Portable View

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

Steps

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

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Distribute and Add Comment

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

Steps

1. Select Meeting requiring distribution > Select 'Distribute'



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

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	Calvin Kwong	Meeting Comments for C000015851-MC1002 - Negative Amendment Test Subproject, Pr	12/28/2021.					
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	🗌 Kahua (DEV)	AEoR Consultant 2 Has Registered A Kahua Account	-					
	🗌 Kahua (DEV)	AEoR Consultant 2 is now a Kahua user for SCA DEVQA	This Message was ser Everritt - Stellar	nt to multiple recipie	ents: Calvin <u>Kwong</u>	- CKwongCo: Justin Jiang	- JustinCo; Thom	as
	🗌 Kahua (DEV)	AEoR Consultant 3 Has Registered A Kahua Account						
	🗌 Kahua (DEV)	AEoR Consultant 3 is now a Kahua user for SCA DEVQA						
	🗌 Kahua (DEV)	AEoR Consultant 4 Has Registered A Kahua Account	✓ ATTACHMENTS					
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3. Attendees select 'Add Comment' > Type Comment > Select Continue

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

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

Finalize and Unlock

Role		Preceding Steps		Outcome
		All attendees added their		Masting is finalized and sound
CM Firm	\rightarrow	comments and CM firm has	\rightarrow	he further edited
		updated accordingly		

Steps

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

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

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								0003	SCA Field Office, Computer Equipment & Contractor Staging Area	12/23/2021	OTHER ATTENDEES
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(I)	Getting Started							0005	Schedule & Phasing	12/23/2021	4. Action Items
	2							0006	Permit Requirements	12/23/2021	
								0007	Construction Site and Access	12/23/2021	
								0008	Emergency Contact Numbers	12/23/2021	
								0009	Insurance / Subcontractors Approval Process	12/23/2021	
								0010	Safety and Job Site Security	12/23/2021	
							∠ s	now All		10 of 25	
				:	3 Item(s)		Unloc	k [[Distribute		

Create New Meetings in a Series

Role	Preceding Steps	Outcome
	The initial Job Progress,	A now Maating in the Carios is
CM Firm	→ Bulletin, or Coordination	
	meeting is finalized.	

Steps

1. Click on desired record > Select Edit Series

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≡		₽ <	NEW NE	W PRE-CONSTRUC	CTION N	Iore 🗸				SEND EDIT VIEW Y DELETE HISTORY EDIT SERIES	
£	٩	Meetings N	0						e	10/26/2021 - Preview) :: ×
		↓ Start Date	Start Time	Туре	Subject	Meeting Number	Last Meeting	Location	References	Details Attendees Meeting Items Action Items	SECTIONS
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Q		10/26/202	1	Pre-Construction		00001	Yes			Meeting Number 00001	AILS
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da										Prepared By	
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2. Read and Verify the Warning Message on top > Enter Meeting Date > Select 'Add Meeting'

	Messages					C00001	5851-MC1002 - Negativ	e Amendment Test Subproject 🖍 😢 External REQMIT-CM1	- 8	×
2		←		NEW 1	NEW PRE-CO	NSTRUCTION		GÐ URL		
Ŀ	Project Finder		۹	Meetings 🗸 🕻)		÷	Job Progress Meeting Two	2:3	×
	Anno			\downarrow Meeting Date	Start Time	Туре	Subject	If you changed specific meetings in the series that are scheduled to occur after today, your changes will be discussed as a different set of the series and the series of	> SECTIO	NS
	White			12/24/2021	5:00 AM	Pre-Construction	Project Requirements and	be discarded and those meetings will match the series again, meetings in this series taking place before today's date will not be affected.	DETAILS	
Q	Search			12/23/2021	8:00 AM	Job Progress	Job Progress Meeting Two	Details	SCHEDULE	:
₽	Tasks		_	12/22/2021	8:00 AM	Job Progress	Job Progress Meeting On€	✓ DETAILS		
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			L.,		3	ltem(s)		Add meeting 3	**	
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Copy information from the previous Meeting in the series to the current Meeting.

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



4. Select 'Continue'

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•			12/23/20	21 8:00 AM	Job Progress	Job Progress	Details		Yes		COMMENTS
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Update Meeting as needed.

5. Select Meeting requiring updates > Select 'Edit'



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

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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.

Role	_	Preceding Steps	_	Outcome
CM Firm	\rightarrow	A meeting has occurred before it was created in CAMP.	\rightarrow	A new meeting is created.

Steps

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

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0											Meeting Date	3/16/2022		OTHER A	TENDEES
	Messages										End Time	11:00 AM		3. Meetin	g Items
<u>~</u> &~	Mestings										Prepared By	Calvin Kwong - CKwongC	0	4. Action	Items
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2. Enter fields in the Details section > Select a 'Meeting Date' that is not in the past > Select 'Save/Close' or 'Add Meeting'

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You la	Add Person	1 item(s)	** kabua
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3. Select the newly created meeting > Select 'Edit'

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