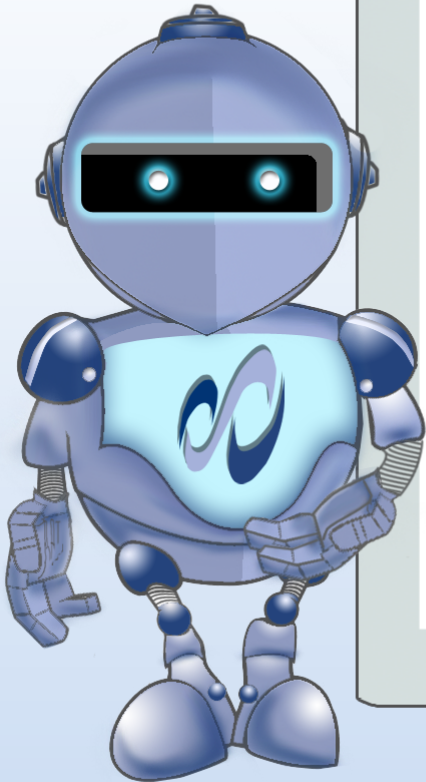


WTS Meeting Module Advanced Functionality

WTS_U206_ITI

Learning Objectives



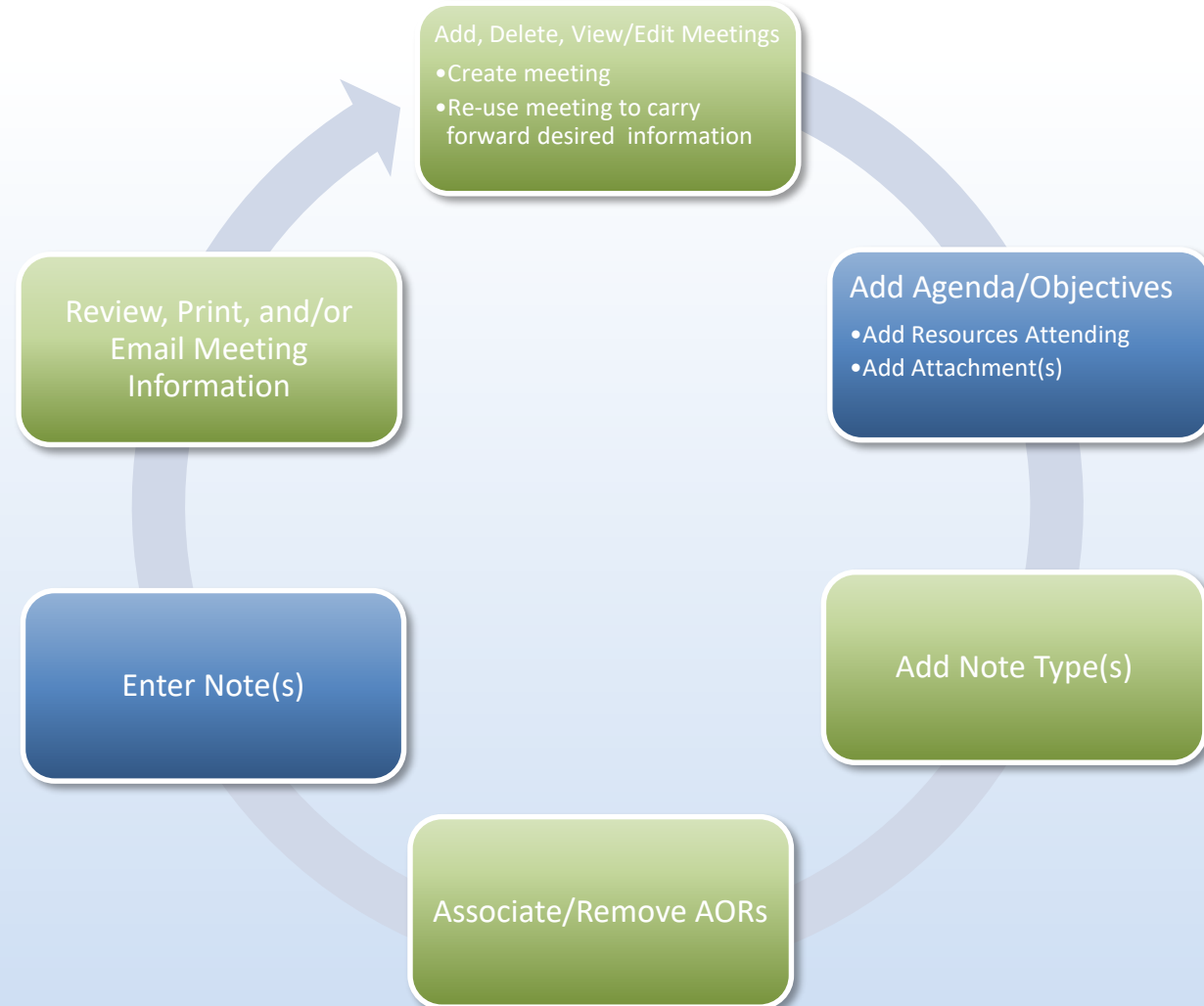
Upon completion of this course, you will:

- Understand the Meeting Cycle
- Learn the advanced functionalities of the WTS Meeting Module
- Know how to use the Meeting Grid to manage meetings
- Learn further usage and functionality of Note Details
- Learn the Note Types and how to use them
- Learn how to associate/remove AORs and Meetings
- Learn how to print and email meetings



Meeting Cycle

The Meeting Module is a dynamic tool that allows users the flexibility to capture meeting information in a variety of ways. In order to most effectively utilize the Module, it is Best Practice to think of the process as a cycle. Once a meeting has been fully built, the user can save a significant amount of set-up time before the next one by launching new meetings that share the same purpose and associated information, from Resources to AORs.



Advanced Functions to be covered in this training

Basic functions covered in previous training

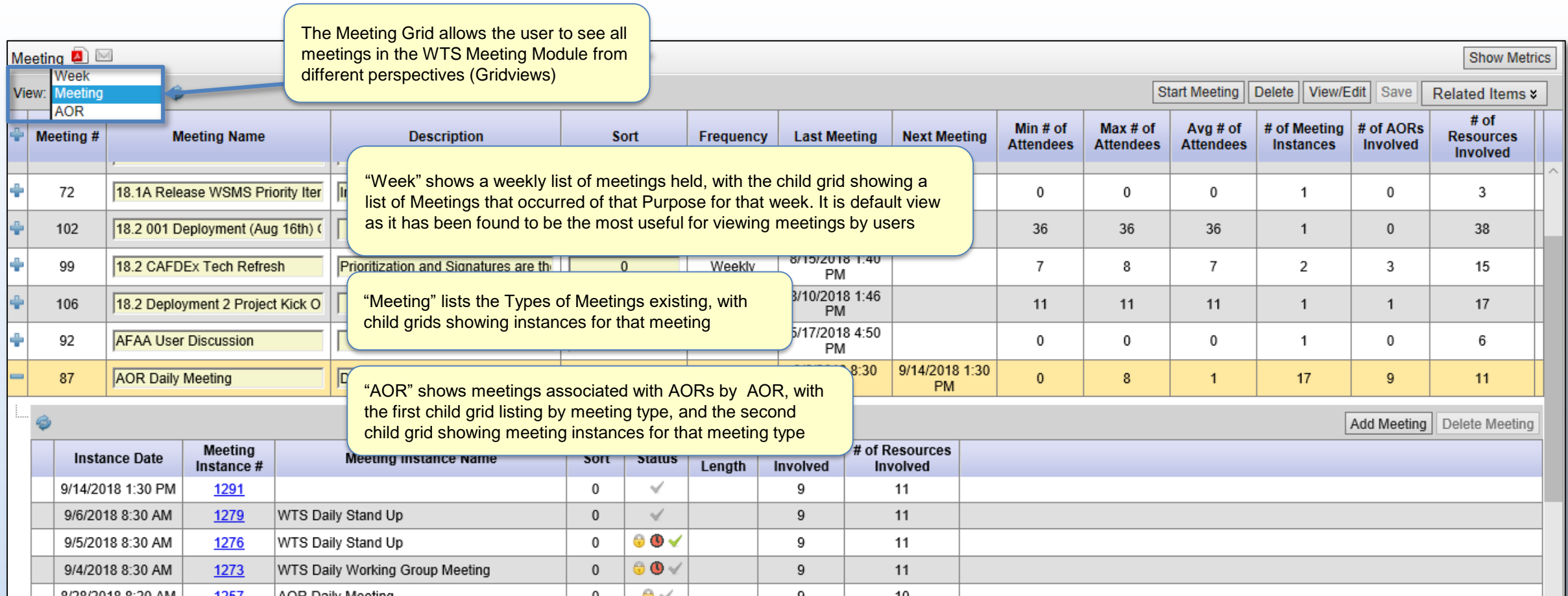
Managing Meetings with the Meeting Grid

The Meeting Grid allows the user to see all meetings in the WTS Meeting Module from different perspectives (Gridviews)

“Week” shows a weekly list of meetings held, with the child grid showing a list of Meetings that occurred of that Purpose for that week. It is default view as it has been found to be the most useful for viewing meetings by users

“Meeting” lists the Types of Meetings existing, with child grids showing instances for that meeting

“AOR” shows meetings associated with AORs by AOR, with the first child grid listing by meeting type, and the second child grid showing meeting instances for that meeting type




Meeting #	Meeting Name	Description	Sort	Frequency	Last Meeting	Next Meeting	Min # of Attendees	Max # of Attendees	Avg # of Attendees	# of Meeting Instances	# of AORs Involved	# of Resources Involved
72	18.1A Release WSMS Priority Iter						0	0	0	1	0	3
102	18.2 001 Deployment (Aug 16th)						36	36	36	1	0	38
99	18.2 CAFDEx Tech Refresh	Prioritization and Signatures are th	0	Weekly	8/15/2018 1:40 PM		7	8	7	2	3	15
106	18.2 Deployment 2 Project Kick O				8/10/2018 1:46 PM		11	11	11	1	1	17
92	AFAA User Discussion				5/17/2018 4:50 PM		0	0	0	1	0	6
87	AOR Daily Meeting				8:30	9/14/2018 1:30 PM	0	8	1	17	9	11

Instance Date	Meeting Instance #	Meeting instance Name	Sort	Status	Length	Involved	# of Resources Involved
9/14/2018 1:30 PM	1291		0	✓		9	11
9/6/2018 8:30 AM	1279	WTS Daily Stand Up	0	✓		9	11
9/5/2018 8:30 AM	1276	WTS Daily Stand Up	0	👤🕒✓		9	11
9/4/2018 8:30 AM	1273	WTS Daily Working Group Meeting	0	👤🕒✓		9	11
8/28/2018 8:30 AM	1257	AOR Daily Meeting	0	👤🕒✓		9	11

Managing Meetings with the Meeting Grid

Clicking **Start Meeting** without selecting a meeting first will launch the New Meeting selector covered in the previous training

Meeting 

View: Week

Start Meeting

Related Items ▾

Week	# of Meetings	# of Meeting Instances	# of AORs Involved	# of Resources Involved
+	1	0	0	0
- 9/10/2018 - 9/16/2018	4	4	15	36

Remember: Use caution when clicking the Delete and Delete Meeting buttons. The data removed cannot be recovered


Meeting #	Meeting Name	Sort	Frequency	Last	# of resources involved
+	87 AOR Daily	0		9/6/2018	11
-	107 Test Meeting	0		9/14/2018 1:30 PM	0

Add Meeting

Delete Meeting

Instance Date	Meeting Instance #	Meeting Instance Name	Actual	# of AORs	# of Resources
9/14/2018 1:30 PM	1290	Test Meeting			
+	103	Weekly PMMA System Level Re:			
+	28	FHP Weekly Developer Meeting			

Clicking a Meeting Instance # will allow the user to view information from that meeting

Use Existing Meeting 

Meeting Date: 09/13/2018 11:50 PM

Notes:

Search for meeting: Test Meeting





Sort By: ☐ Name ☐ Last Meeting ☒ Week

Direction: ☐ Ascending ☒ Descending

NOT SCHEDULED

Test Meeting Meeting #107 No Occurrences

Use and Functionality of Note Details

Meeting    

Note details allow the user freedom to log notes in a variety of ways: All on 1 Page, Per AOR, and Per Note Type. These can be selected on the left side of the meeting

1291 -

Agenda AORs Included Resources Attending History Metrics Attachments

By AOR By Type

Go to Note # Note Breakout: - All - ☐ Show Removed Note Breakouts View Historical Notes Add Note Detail Edit Objectives

Note #	Note Type	Title	AOR Name	Date Added	Status	Status Date	Sort	History
Remove 87627	Notes	Toda		4/23/2018 11:33 AM	N/A	4/23/2018 11:33 AM	0	

-----9/6/2018-----

Logged Items:

- WTS 17112-2: Need to Include "Sessions" filter into the Sprint Builder.
- WTS 17003-42: DSE Report >> Rename "Risk" Column to "AOR Risk"
- WTS 17003- 40: RQMT Metrics Integration - "RQMT Risk" column
- WTS 17003- 43: Deployment Assessment - Need to display "Session Narrative" on the DSE Report
- WTS 17112-3: Sprint Builder - Need a narrative for Sessions. - Also need this narrative on the DSE Report

All on 1 Page

Best Practice: Copy the Agenda Objectives and paste them into a No AOR Associated Note to easily capture notes based on objective(s) discussed

Per AOR

Best Practice: Create a Note Detail for each associated AOR. This can be useful in order to quickly locate specific information

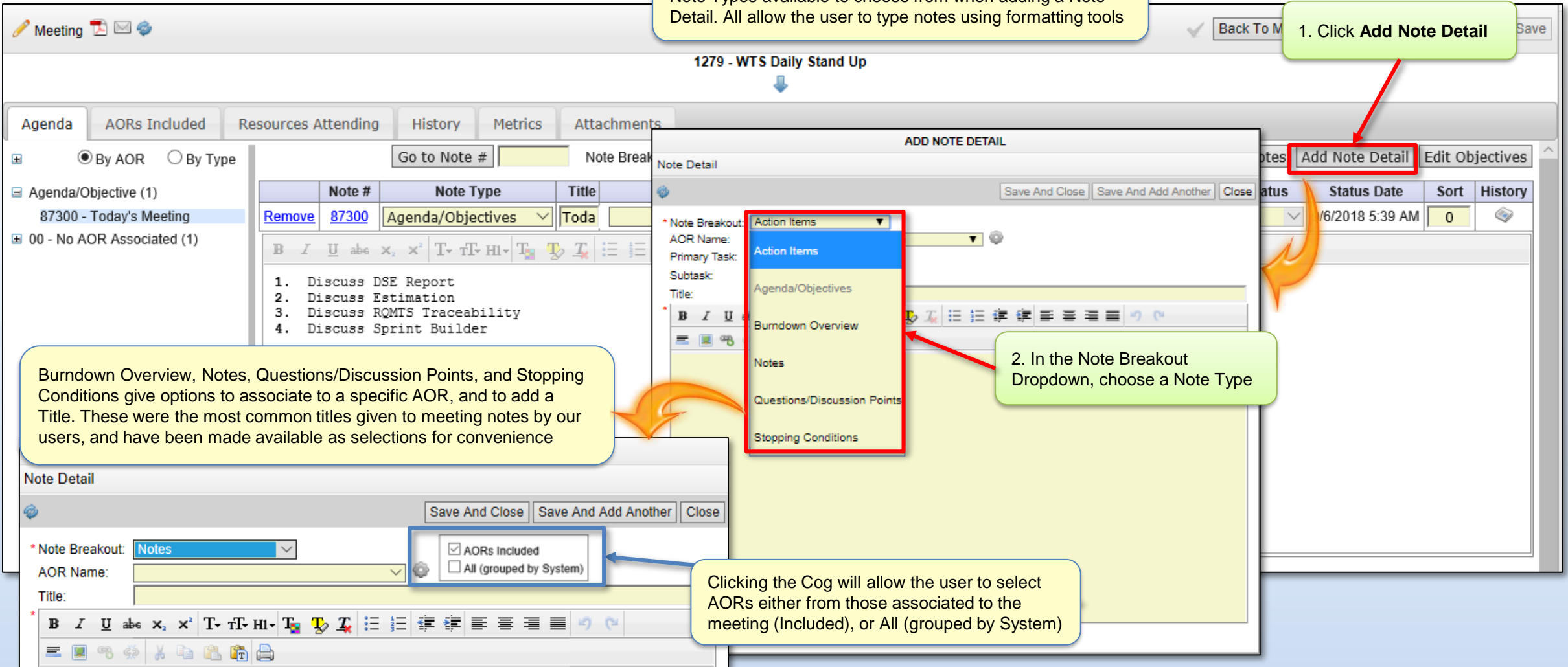
Per Note Type

Best Practice: Useful when holding broad-topic meetings in order to keep information organized not by AOR but by topic

Note Types

Once Agenda/Objectives have been created, there are 5 Note Types available to choose from when adding a Note Detail. All allow the user to type notes using formatting tools

1. Click **Add Note Detail**



ADD NOTE DETAIL

Note Breakout: **Notes**

AOR Name:

Title:

☒ AORs Included
☐ All (grouped by System)

Buttons: Save And Close, Save And Add Another, Close

Background Meeting Agenda: 1279 - WTS Daily Stand Up

- Agenda/Objective (1)
- 87300 - Today's Meeting
- 00 - No AOR Associated (1)

Agenda/Standup Topics:

1. Discuss DSE Report
2. Discuss Estimation
3. Discuss RQMTS Traceability
4. Discuss Sprint Builder

Burndown Overview, Notes, Questions/Discussion Points, and Stopping Conditions give options to associate to a specific AOR, and to add a Title. These were the most common titles given to meeting notes by our users, and have been made available as selections for convenience

2. In the Note Breakout Dropdown, choose a Note Type

Clicking the Cog will allow the user to select AORs either from those associated to the meeting (Included), or All (grouped by System)

Action Items – Existing Tasks

ADD NOTE DETAIL

Note Detail

* Note Breakout: Action Items

AOR Name: (O) 298 - WTS - Work Towards CMMI App

Primary Task:


Subtask:

Title:

B I U abc x₂ x² T tT HI

1 Filter Applied Work Task #: Search for multiple work tasks by comma separating work task #s Search 1 Work Task Checked

Action Items are the unique Note Type in the Meeting Module. This allows the user to link and/or create Primary or Sub Tasks from within the Meeting Module



Remember: Action items give visibility of workload in the meeting module, but removing an action item does not close or otherwise affect the maintenance of that workload

SELECT PRIMARY TASK

Add Select Task

Work Task	Title	System(Task)	Product	Production	Priority	SR	Status	Percent Complete
16963	Posting Emails							
<input type="checkbox"/>	17071	WTS_105_ITI						
<input type="checkbox"/>	17070	WTS_104_ITI WTS CR Report						
<input type="checkbox"/>	17064	WTS_103_ITI WTS Multi-Level						
<input type="checkbox"/>	17057	WTS_102_ITI WTS AOR Maint						
<input type="checkbox"/>	17056	WTS_101_ITI WTS Entering P						
<input type="checkbox"/>	17052	WTS_100_ITI WTS Fundamen						
<input checked="" type="checkbox"/>	16963	Posting Emails						
<input type="checkbox"/>	16947	WTS Course Training Develop						
<input type="checkbox"/>	16945	WTS_104_1 ALL Fundamenta						

ADD NOTE DETAIL

* Note Breakout: Action Items

AOR Name: (O) 298 - WTS - Work Towards CMMI App

Primary Task: 16963

Subtask:

Title: Posting Emails

B I U abc x₂ x² T tT HI

Save And Close Save And Add Another Close

Meeting

Agenda AORs Included Resources Attending History Metrics Attachments

☒ By AOR ☐ By Type

Agenda/Objective (1)

87630 -

Action Items (1)

87633 - Posting Emails

Go to Note #

Note Type	Title
Posting Emails	Posting Emails

Task ID: 16963 Posting Emails

B I U abc x₂ x² T tT HI

Track progress of WTS 16963 - Posting Emails

2. Select one or more tasks

1. Enter a Primary Task number or click the search icon

3. Click **Select Task**

4. Enter the Note information needed for the meeting and click **Save And Close** or **Save And Add Another**

The Note Detail will appear on the left in the Meeting Grid

Action Items – Adding a Task

Action Items are the unique Note Type in the Meeting Module. This allows the user to link and/or create Primary or Sub Tasks from within the Meeting Module

The screenshot shows the 'ADD NOTE DETAIL' form. The 'Primary Task' field is highlighted with a red box, and a red arrow points to a magnifying glass icon within this field. A green callout box with the text '1. Click the search icon' points to this icon. Other fields include 'Note Breakout' (set to 'Action Items'), 'AOR Name' (set to '(O) 298 - WTS - Work Towards CMMI App'), and 'Subtask'. The bottom of the form shows a toolbar with various icons and a 'Work Task' section with a filter applied.

SELECT PRIMARY TASK

Search icon

1 Filter Applied

Work Task #: Search for multiple work tasks by comma separating work task #s Search

1 Work Task Checked

Work Task	Title	System(Task)	Product Version	Production Status	Priority	SR Number	Status	Percent Complete
16963	Posting Emails	R&D WTS	18.2	Internal Support	High		In Progress	0

ADD TASK

3. Enter information to build the Primary Task and click **Save**

Updated:

Workload Priority of Subtasks: 0.0.0.0.0 (0, 0%)

Primary Task -

Details Notes Attachments

Primary Task

Primary Task Details:

Primary Task: [] *

Submitted: []

* System(Task): [-Select-]

Contract: []

* Resource Group: [-Select-]

* Work Activity: [-Select-]

* Priority: [-Select-]

* Status: [-Select-]

* Assigned To: [-Select-]

Primary Resource: [-Select-]

Assigned To Rank: [5 - Unprioritized Workload]

Customer Rank: []

Release/Deployment MGMT AOR

Workload Allocation: []

Workload MGMT AOR

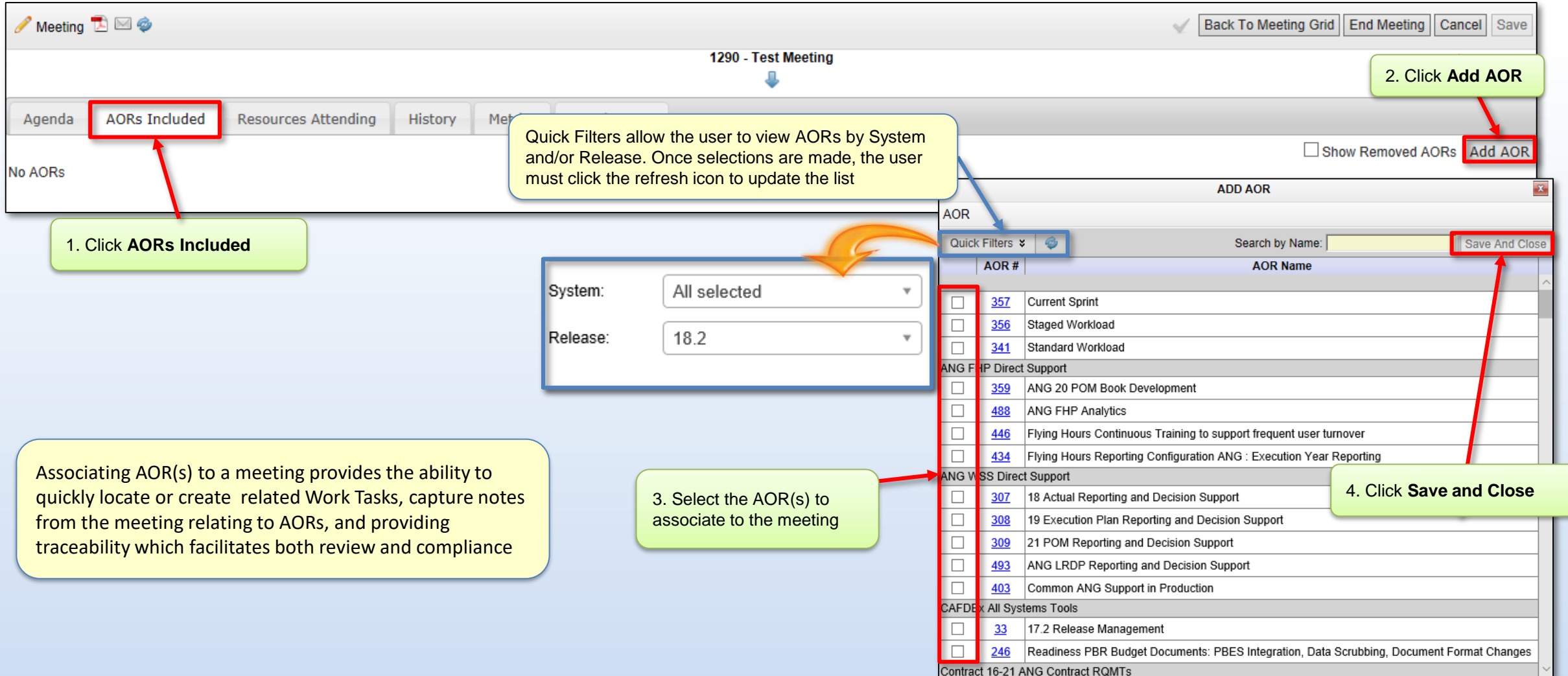
Workload Priority of Subtasks: 0.0.0.0.0 (0, 0%)

No Affiliated Resources

Updated: []

3. Enter information to build the Primary Task and click **Save**

Associating AORs



1. Click AORs Included

2. Click Add AOR

Quick Filters allow the user to view AORs by System and/or Release. Once selections are made, the user must click the refresh icon to update the list

3. Select the AOR(s) to associate to the meeting

4. Click Save and Close

Associating AOR(s) to a meeting provides the ability to quickly locate or create related Work Tasks, capture notes from the meeting relating to AORs, and providing traceability which facilitates both review and compliance

ADD AOR

Quick Filters: Search by Name:

AOR #	AOR Name
<input type="checkbox"/> 357	Current Sprint
<input type="checkbox"/> 356	Staged Workload
<input type="checkbox"/> 341	Standard Workload
ANG FHP Direct Support	
<input type="checkbox"/> 359	ANG 20 POM Book Development
<input type="checkbox"/> 488	ANG FHP Analytics
<input type="checkbox"/> 446	Flying Hours Continuous Training to support frequent user turnover
<input type="checkbox"/> 434	Flying Hours Reporting Configuration ANG : Execution Year Reporting
ANG VSS Direct Support	
<input type="checkbox"/> 307	18 Actual Reporting and Decision Support
<input type="checkbox"/> 308	19 Execution Plan Reporting and Decision Support
<input type="checkbox"/> 309	21 POM Reporting and Decision Support
<input type="checkbox"/> 493	ANG LRDP Reporting and Decision Support
<input type="checkbox"/> 403	Common ANG Support in Production
CAFDEx All Systems Tools	
<input type="checkbox"/> 33	17.2 Release Management
<input type="checkbox"/> 246	Readiness PBR Budget Documents: PBES Integration, Data Scrubbing, Document Format Changes

Contract 16-21 ANG Contract RQMTs

Removing AORs

Meeting [Icons] 1291 - [Back To Meeting Grid] [End Meeting] [Cancel] [Save]

Agenda | AORs Included | Resources Attending | History | Metrics | Attachments

☐ Show Removed AORs [Add AOR]

	AOR #	AOR Type	Description	Date Added
(0/1) Remove	178	Release/Deployment MGMT	Mission of Adoption of AOR Managing Tasks.	4/19/2018 8:38 AM
(3/0) Remove	235		Training materials are primarily accessible through the Help Menu. Coordinating with the Process owners on said materials will be visible to Process owners, currently tracked and visible only by ITI and provided as requested. This will help manage risks of new users with higher visibility of their training to support requirements managers and process owners on	4/19/2018 8:38 AM
(0/0) Remove	177			
(1/0) Remove	194			
(0/0) Remove	290			

AORs can be disassociated from a meeting by clicking **Remove**

AORs that have been removed can be displayed along with Included AORs by clicking this checkbox

Meeting [Icons] 1291 - [Back To Meeting Grid] [End Meeting] [Cancel] [Save]

Agenda | AORs Included | Resources Attending | History | Metrics | Attachments

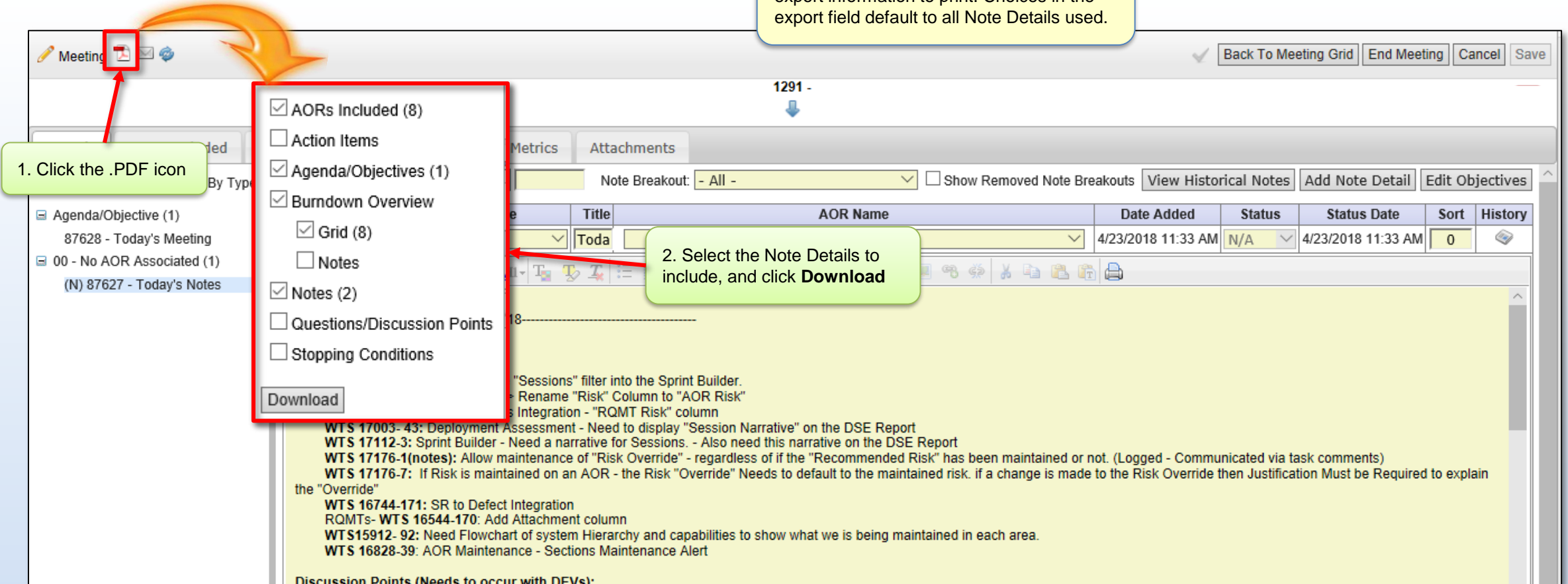
☒ Show Removed AORs [Add AOR]

	AOR #	AOR Name	AOR Type	Description	Date Added
(0/0) Re-Add	234	Achieve Industry C	Release/Deployment MGMT		4/19/2018 8:38 AM
(0/1) Remove	178	Adoption of AOR M	Release/Deployment MGMT	Mission of Adoption of AOR Managing Tasks.	4/19/2018 8:38 AM
(3/0) Remove	235	Integration of Training to User Management	Release/Deployment MGMT	Training materials are primarily accessible through the Help Menu. Coordinating with the Process owners on said materials will be visible to Process owners, currently tracked and visible only by ITI and provided as requested. This will help manage risks of new users with higher visibility of their training to support requirements managers and process owners on	4/19/2018 8:38 AM

Removed AORs sort to the top of the list, and can be quickly associated by clicking **Re-Add**

Printing Meetings

As with all CAFDEx systems, users can export information to print. Choices in the export field default to all Note Details used.



The screenshot shows the CAFDEx Meeting interface. A red box highlights the .PDF icon in the top left corner, with a callout box stating: "1. Click the .PDF icon". A red box highlights the export options menu, with a callout box stating: "2. Select the Note Details to include, and click **Download**". The export options menu includes the following items:

- ☒ AORs Included (8)
- ☐ Action Items
- ☒ Agenda/Objectives (1)
- ☒ Burndown Overview
 - ☒ Grid (8)
 - ☐ Notes
- ☒ Notes (2)
- ☐ Questions/Discussion Points
- ☐ Stopping Conditions
- Download**

The interface also shows a table with columns: Title, AOR Name, Date Added, Status, Status Date, Sort, and History. The table contains one row with the following data:

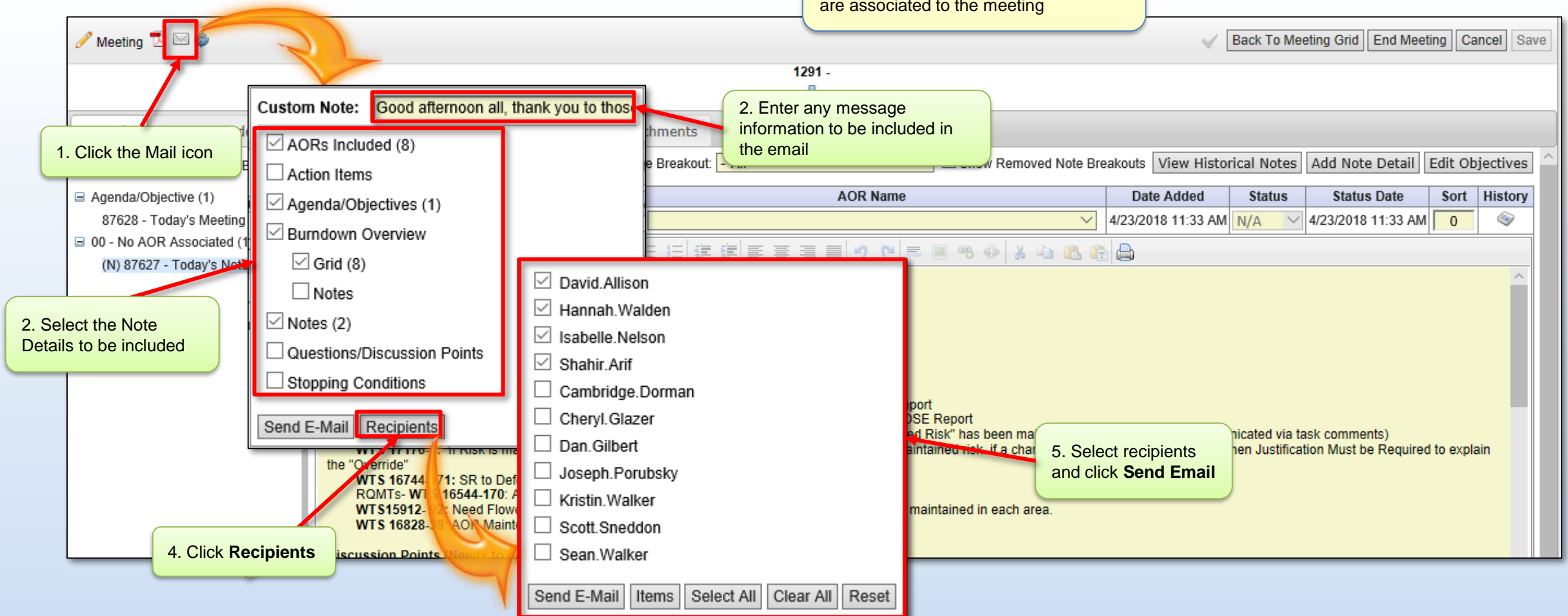
Title	AOR Name	Date Added	Status	Status Date	Sort	History
Today's Meeting		4/23/2018 11:33 AM	N/A	4/23/2018 11:33 AM	0	

Below the table, there is a section titled "Discussion Points (Needs to occur with DEVs):" with the following text:

WTS 17003-43: Deployment Assessment - Need to display "Session Narrative" on the DSE Report
 WTS 17112-3: Sprint Builder - Need a narrative for Sessions. - Also need this narrative on the DSE Report
 WTS 17176-1(notes): Allow maintenance of "Risk Override" - regardless of if the "Recommended Risk" has been maintained or not. (Logged - Communicated via task comments)
 WTS 17176-7: If Risk is maintained on an AOR - the Risk "Override" Needs to default to the maintained risk. if a change is made to the Risk Override then Justification Must be Required to explain the "Override"
 WTS 16744-171: SR to Defect Integration
 RQMTs- WTS 16544-170: Add Attachment column
 WTS15912- 92: Need Flowchart of system Hierarchy and capabilities to show what we is being maintained in each area.
 WTS 16828-39: AOR Maintenance - Sections Maintenance Alert

Emailing Meetings

This step saves the user considerable time, provided the intended recipient(s) are associated to the meeting



1. Click the Mail icon

2. Enter any message information to be included in the email

2. Select the Note Details to be included

4. Click Recipients

5. Select recipients and click Send Email

Custom Note: Good afternoon all, thank you to those

Send E-Mail **Recipients**

Send E-Mail **Items** **Select All** **Clear All** **Reset**

AOR Name	Date Added	Status	Status Date	Sort	History
	4/23/2018 11:33 AM	N/A	4/23/2018 11:33 AM	0	

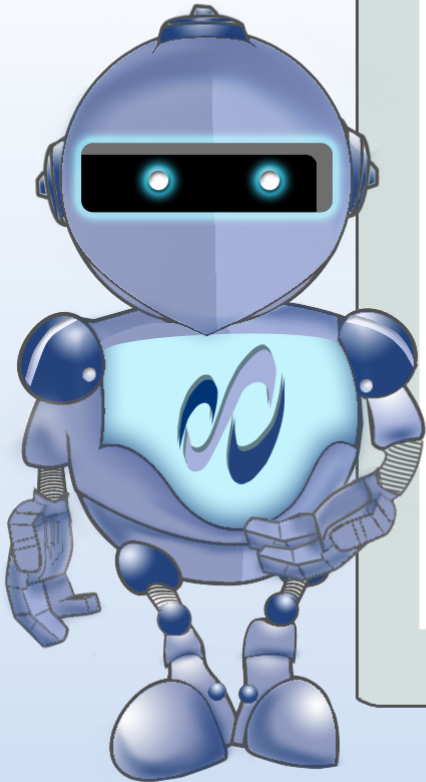
Recipients List:

- ☒ David.Allison
- ☒ Hannah.Walden
- ☒ Isabelle.Nelson
- ☒ Shahir.Arif
- ☐ Cambridge.Dorman
- ☐ Cheryl.Glazer
- ☐ Dan.Gilbert
- ☐ Joseph.Porubsky
- ☐ Kristin.Walker
- ☐ Scott.Sneddon
- ☐ Sean.Walker

Note Details:

- ☒ AORs Included (8)
- ☐ Action Items
- ☒ Agenda/Objectives (1)
- ☒ Burndown Overview
- ☒ Grid (8)
- ☐ Notes
- ☒ Notes (2)
- ☐ Questions/Discussion Points
- ☐ Stopping Conditions

Take Aways



- The Meeting Cycle refers to the ability to recycle previous meetings to efficiently create meetings that have the same purpose and associated information
- The Meeting Grid can be used to Add, View/Edit, and Delete Meetings
- Users have the flexibility to utilize Note Details to keep meeting information broad and homogenous, or more compartmentalized
- Note Types are commonly used meeting note titles
- The Action Items Note Type allows users to associate and/or create WTS Primary and Sub Tasks without leaving the Meeting Module
- AORs can be quickly added or removed from a meeting
- Meeting information can be printed or emailed without leaving the Meeting

