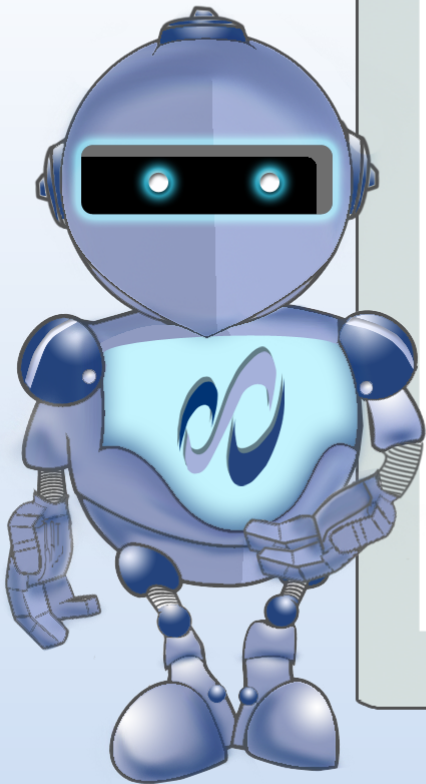


WTS Meeting Module Basics

WTS_U105_ITI

Learning Objectives




Upon completion of this course, you will:


- Learn the main functionalities of the Meeting Module
- Know how to create a New Meeting and when to do so
- Discover how to navigate to an Existing Meeting and when to do so
- Learn to create an Agenda/Objective for a meeting
- Discover how to create a Notes section for a meeting
- Know how to set up Resources expected to attend the meeting
- Learn how to add Attachments to a meeting



Navigating to the Meeting Module/Starting a Meeting

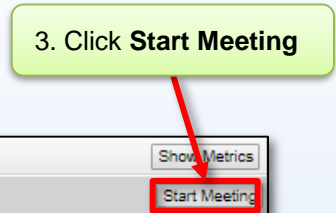
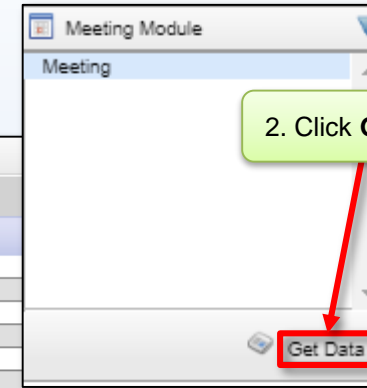
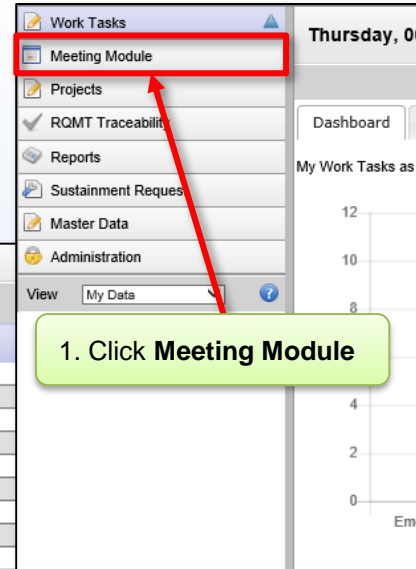
Different views allow the user to see meeting information (Week, Meeting, AOR), and each can help a user find an existing meeting that fits the purpose of the meeting to be set up

Meeting 

View: Week 

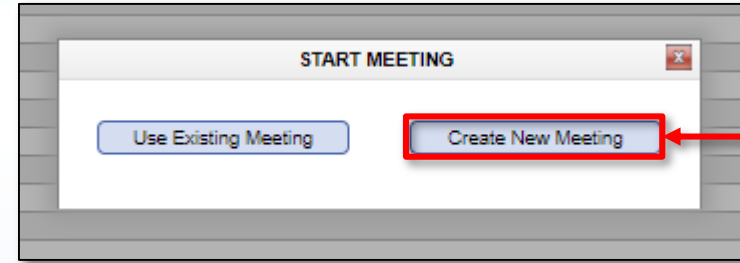
Week	# of Meetings	# of Meeting Instances	# of AORs Involved	# of Resources Involved
9/3/2018 - 9/9/2018	1	0	0	0
8/27/2018 - 9/2/2018	3	3	12	27
8/20/2018 - 8/26/2018	12	17	70	68
8/13/2018 - 8/19/2018	12	16	61	67
8/6/2018 - 8/12/2018	12	22	75	60
7/30/2018 - 8/5/2018	12	16	29	60
7/23/2018 - 7/29/2018	11	19	55	60
7/16/2018 - 7/22/2018	9	16	55	58
7/9/2018 - 7/15/2018	7	10	54	59
7/2/2018 - 7/8/2018	7	8	24	52
6/25/2018 - 7/1/2018	9	13	55	59
6/18/2018 - 6/24/2018	8	14	55	57
6/11/2018 - 6/17/2018	7	12	71	57
6/4/2018 - 6/10/2018	7	13	71	57
5/28/2018 - 6/3/2018	5	11	46	57
5/21/2018 - 5/27/2018	8	13	48	55
5/14/2018 - 5/20/2018	9	12	46	60
5/7/2018 - 5/13/2018	7	14	58	54
4/30/2018 - 5/6/2018	9	18	42	55
4/23/2018 - 4/29/2018	8	16	42	59
4/16/2018 - 4/22/2018	9	20	41	83
4/9/2018 - 4/15/2018	7	13	38	83
4/2/2018 - 4/8/2018	9	14	38	83
3/26/2018 - 4/1/2018	6	8	46	45

1 2 3



This grid allows the user to go "Straight to Guns" with a meeting that already exists, provided that the meeting has the correct attributes. This will be covered in another training in this series, where we will cover the process of "Running a Meeting"

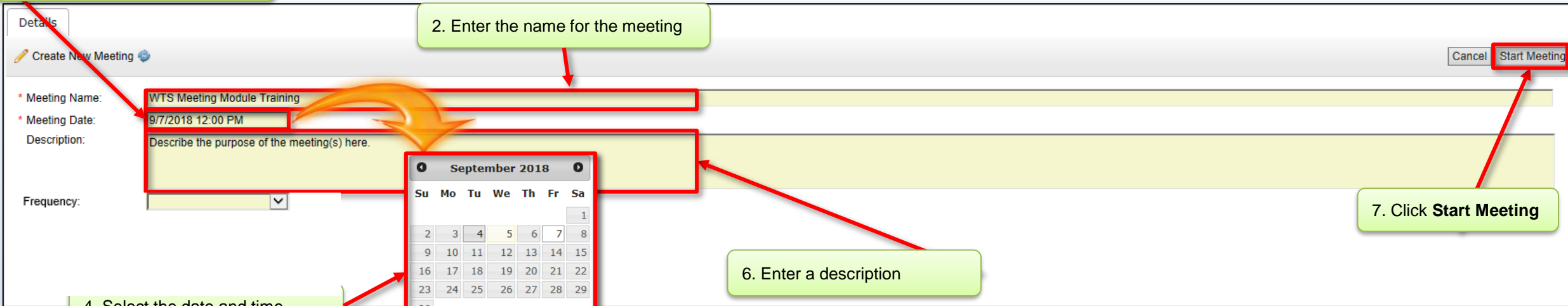
Creating a New Meeting



1. Click **Create New Meeting**

3. Click in the Meeting Date field to launch the selector window

2. Enter the name for the meeting



Details

Create New Meeting

* Meeting Name: WTS Meeting Module Training

* Meeting Date: 9/7/2018 12:00 PM

Description: Describe the purpose of the meeting(s) here.

Frequency: [v]

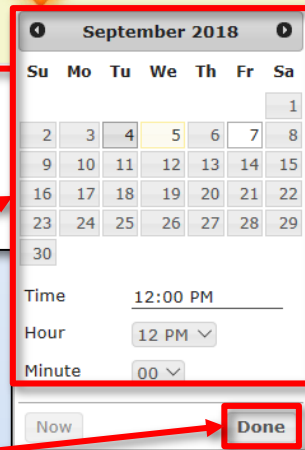
Cancel Start Meeting

7. Click **Start Meeting**

4. Select the date and time

6. Enter a description

5. Click **Done**



September 2018

Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

Time 12:00 PM

Hour 12 PM v

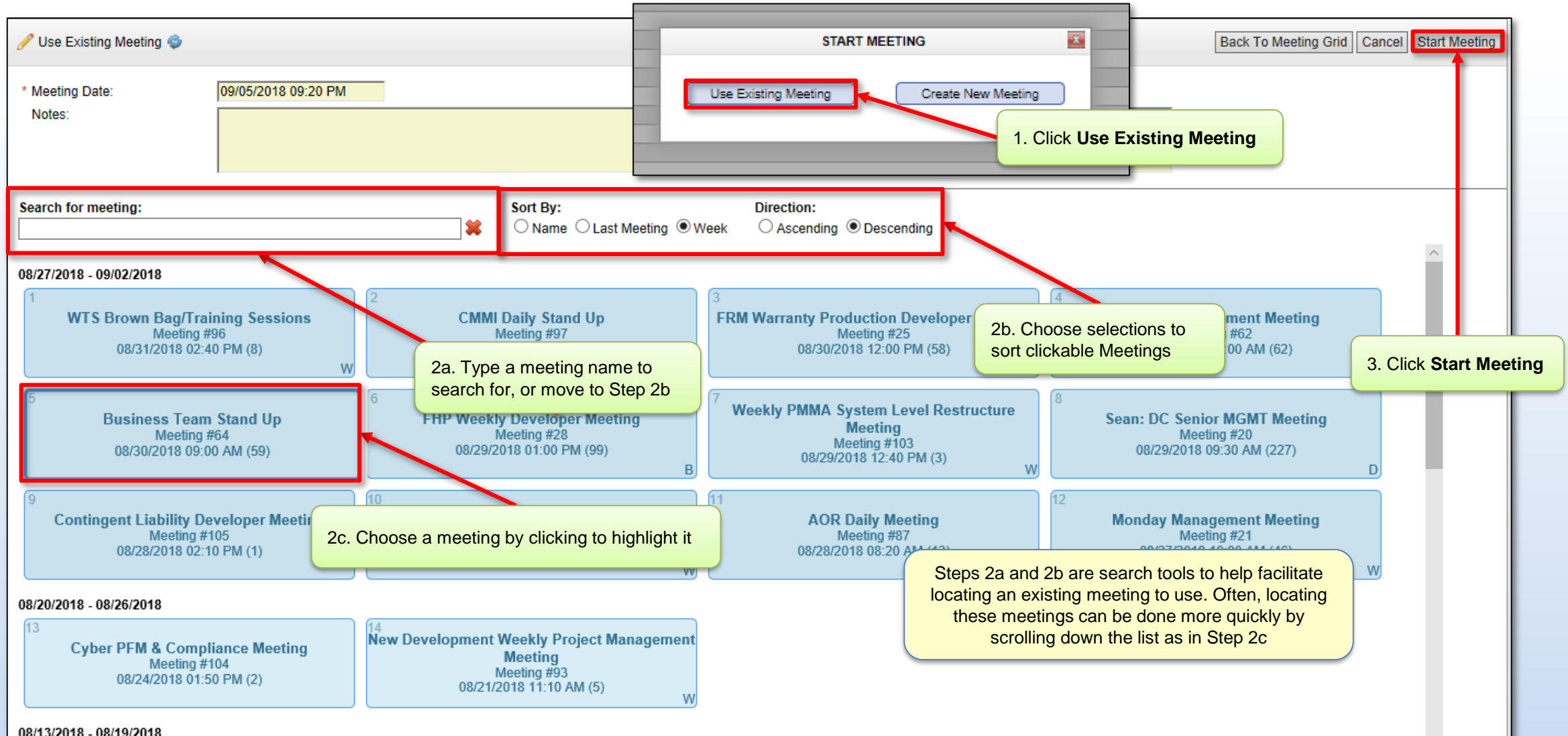
Minute 00 v

Now Done



Remember: **Meeting Name/Date/Time** will be uniquely enforced by the system. There cannot be multiple meetings with the same Name, Date, and Time.

Using an Existing Meeting



Use Existing Meeting

* Meeting Date: 09/05/2018 09:20 PM

Notes:

START MEETING

Back To Meeting Grid Cancel **Start Meeting**

Use Existing Meeting Create New Meeting

1. Click **Use Existing Meeting**

Search for meeting: X

Sort By: ☐ Name ☐ Last Meeting ☒ Week Direction: ☐ Ascending ☒ Descending

2b. Choose selections to sort clickable Meetings

3. Click **Start Meeting**

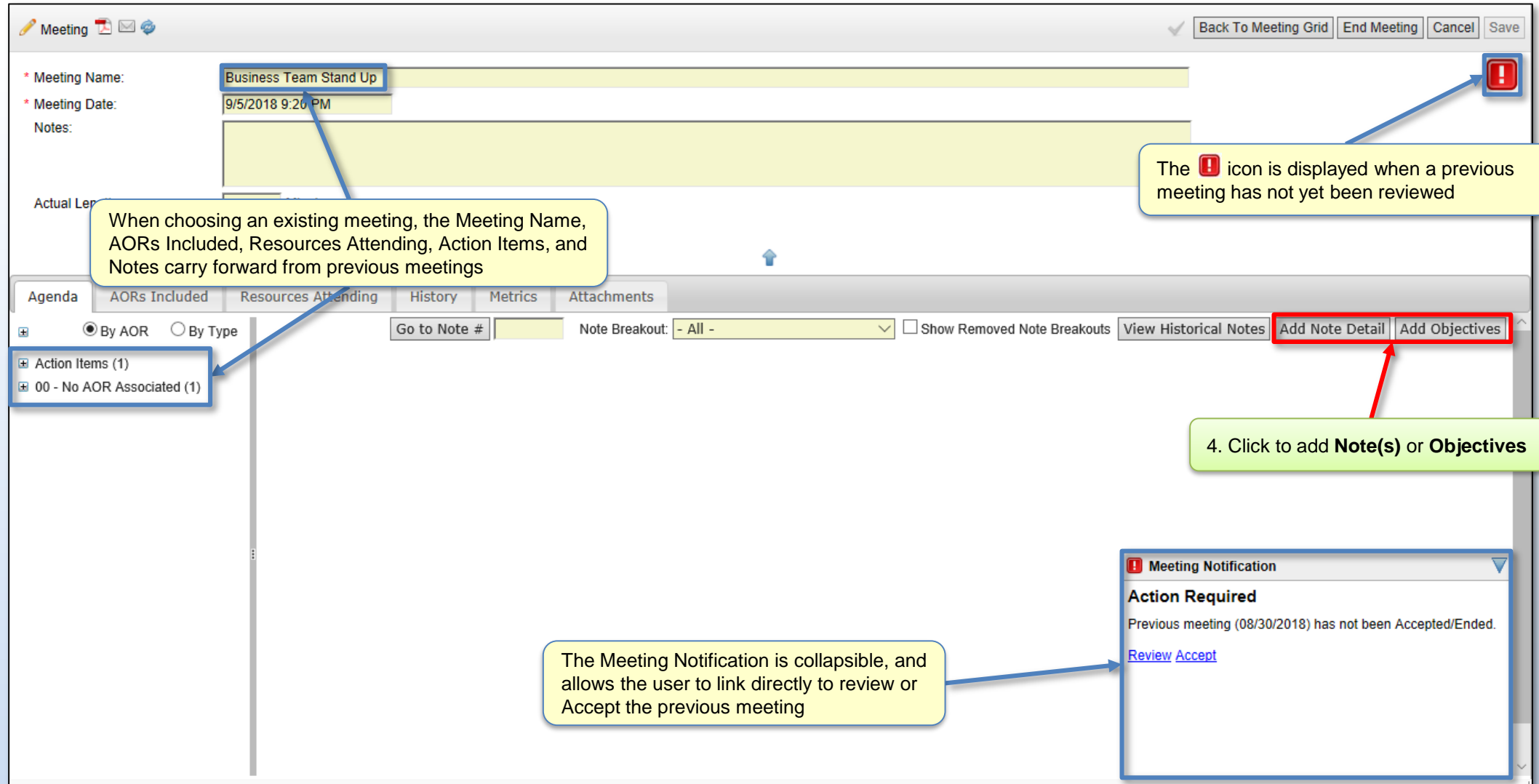
2a. Type a meeting name to search for, or move to Step 2b

2c. Choose a meeting by clicking to highlight it

Steps 2a and 2b are search tools to help facilitate locating an existing meeting to use. Often, locating these meetings can be done more quickly by scrolling down the list as in Step 2c

08/27/2018 - 09/02/2018	
1 WTS Brown Bag/Training Sessions Meeting #96 08/31/2018 02:40 PM (8) W	2 CMMI Daily Stand Up Meeting #97
3 FRM Warranty Production Developer Meeting #25 08/30/2018 12:00 PM (58)	4 ment Meeting #62 00 AM (62)
5 Business Team Stand Up Meeting #64 08/30/2018 09:00 AM (59)	6 FHP Weekly Developer Meeting Meeting #28 08/29/2018 01:00 PM (99) B
7 Weekly PMMA System Level Restructure Meeting Meeting #103 08/29/2018 12:40 PM (3) W	8 Sean: DC Senior MGMT Meeting Meeting #20 08/29/2018 09:30 AM (227) D
9 Contingent Liability Developer Meeting Meeting #105 08/28/2018 02:10 PM (1)	10
11 AOR Daily Meeting Meeting #87 08/28/2018 08:20 AM (43)	12 Monday Management Meeting Meeting #21 08/27/2018 10:00 AM (46) W
08/20/2018 - 08/26/2018	
13 Cyber PFM & Compliance Meeting Meeting #104 08/24/2018 01:50 PM (2)	14 New Development Weekly Project Management Meeting Meeting #93 08/21/2018 11:10 AM (5) W
08/13/2018 - 08/19/2018	

Using an Existing Meeting



Meeting [Meeting Icon] [Email Icon] [Share Icon]

Back To Meeting Grid End Meeting Cancel Save

* Meeting Name: Business Team Stand Up

* Meeting Date: 9/5/2018 9:26 PM

Notes:

Actual Length:

When choosing an existing meeting, the Meeting Name, AORs Included, Resources Attending, Action Items, and Notes carry forward from previous meetings

The ! icon is displayed when a previous meeting has not yet been reviewed

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 Add Objectives

Action Items (1)

00 - No AOR Associated (1)

4. Click to add **Note(s)** or **Objectives**

The Meeting Notification is collapsible, and allows the user to link directly to review or Accept the previous meeting

Meeting Notification

Action Required

Previous meeting (08/30/2018) has not been Accepted/Ended.

[Review](#) [Accept](#)

Adding Agenda/Objective(s)

The purpose of Agenda/Objectives is to provide a bulleted list of items to be covered in the meeting. The types of bullets can be controlled via the Sequence area

1. Click **Add Objectives**

Meeting [Icons]

1273 - WTS Meeting Module Training

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

By AOR (selected) | By Type

Go to Note # [] Note Breakout: - All - [v] ☐ Show Removed Note Breakouts View Historical Notes Add Note Detail **Add Objectives**

Add Note Objectives

Note Breakout: Agenda/Objectives

Title: []

Objectives:

#	Move/Add	Sequence	Title	
1	[Icons]	1	Objective 1	[Icons]
2	[Icons]	1	Objective 2	[Icons]
3	[Icons]	1	2.1. Objective 2a	[Icons]
4	[Icons]	1	2.2. Objective 2b	[Icons]

Save And Close [Close]

The Move/Add area allows the user to position, add, or delete items in the list of objectives

2. Enter the Title of the Objective(s) here

3. Click **Save And Close**

Adding a Note

Key Information

1273 - WTS Meeting Module Training

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 86754	Agenda/Objectives	Training Objectives		9/5/2018 11:06 AM	N/A	9/5/2018 11:06 AM	0	

1. Click **Add Note Detail**

2. Select "Notes" from the dropdown

3. Enter note information here

4. Click **Save And Close**

Note Detail

* Note Breakout: Notes

AOR Name:

Title: Meeting Notes

9/7/18

Objective 1

Objective 2

Save And Close Save And Add Another Close

Meeting

Agenda AORs Included Resources Attending History Metrics Attachments

By AOR By Type

Agenda/Objective (1)

86754 - Training Objectives

00 - No AOR Associated (1)

(N) 86774 - Meeting Notes

Note #	Note Type	Title
Remove 86774	Notes	Meeting Notes

9/7/18

Objective 1

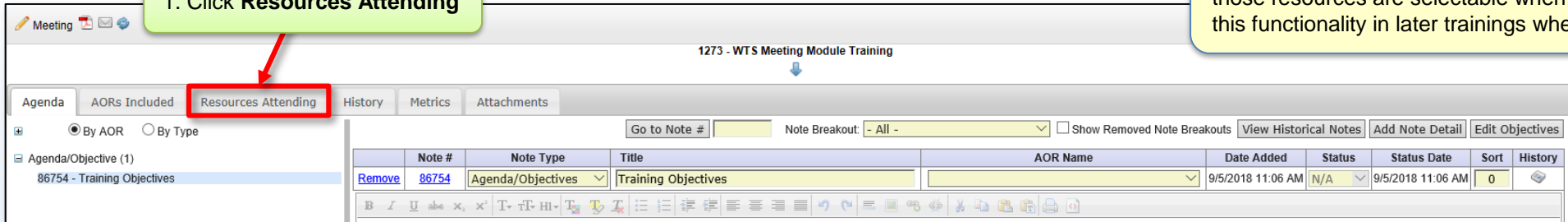
Objective 2

Notes are organized in tree format on the left side of the Agenda tab

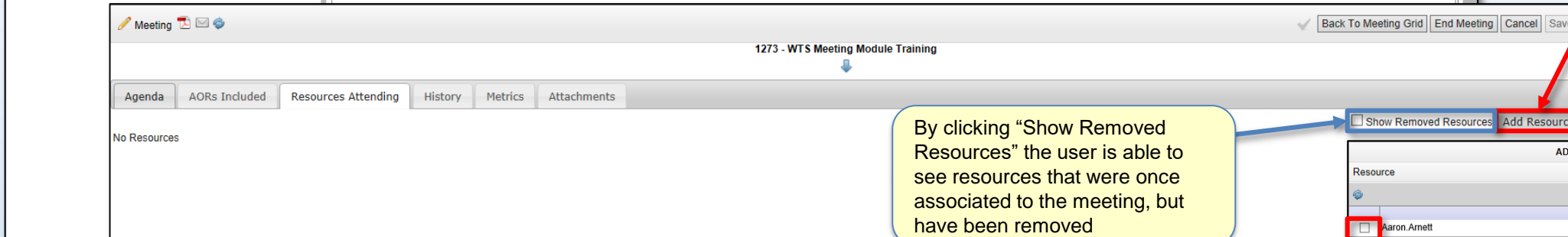
Adding Resources Attending

1. Click **Resources Attending**

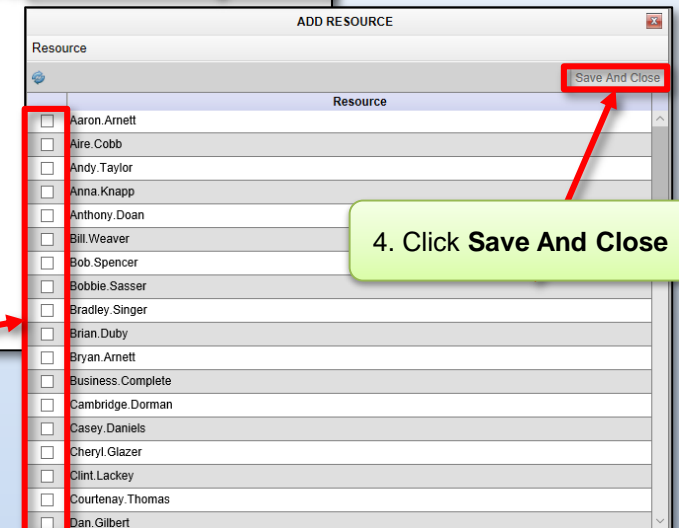
By Adding Resources Attending when creating/maintaining a meeting, those resources are selectable when running the meeting. We will see this functionality in later trainings when we cover running a meeting



2. Click **Add Resource**



By clicking "Show Removed Resources" the user is able to see resources that were once associated to the meeting, but have been removed

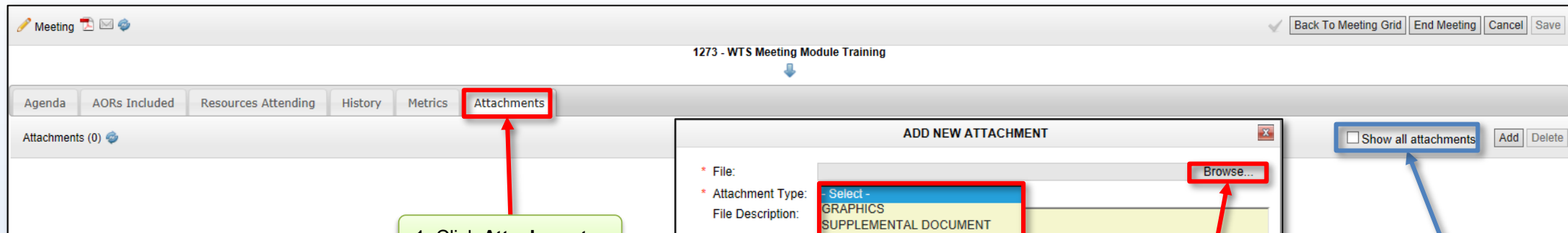


4. Click **Save And Close**

3. Select Resources expected to attend meeting

Remember: **Resources Attending** is a critical piece of Meeting Information. This is valuable for CMMI compliance (historical records of meetings, tracking training progress, etc.)

Adding an Attachment



The screenshot shows a web application interface for a meeting titled "1273 - WTS Meeting Module Training". At the top, there are tabs for "Agenda", "AORs Included", "Resources Attending", "History", "Metrics", and "Attachments". The "Attachments" tab is selected. Below the tabs, there is a section for "Attachments (0)". A red arrow points from the "Attachments" tab to a green callout box labeled "1. Click Attachments".

Overlaid on the interface is a dialog box titled "ADD NEW ATTACHMENT". It contains the following fields:

- * File: A text input field with a "Browse..." button next to it. A red arrow points from the "Browse..." button to a green callout box labeled "2. Click Browse and select a file to attach".
- * Attachment Type: A dropdown menu with the following options: "Select -", "GRAPHICS", "SUPPLEMENTAL DOCUMENT", and "CVT". A red arrow points from the dropdown menu to a green callout box labeled "3. Select an Attachment Type".
- File Description: A text input field.

 At the bottom of the dialog box, there are "Save" and "Close" buttons. A red arrow points from the "Save" button to a green callout box labeled "4. Click Save".

On the right side of the dialog box, there is a checkbox labeled "Show all attachments" and buttons for "Add" and "Delete". A blue arrow points from the "Show all attachments" checkbox to a yellow callout box.

1. Click **Attachments**

2. Click **Browse** and select a file to attach

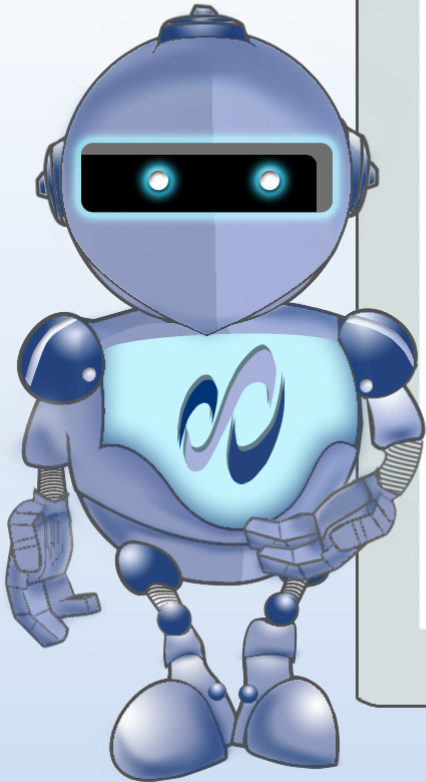
3. Select an Attachment Type

4. Click **Save**

Adding an Attachment helps preserve the story of the meeting and can give context and detail that may be difficult to capture in the Notes section. These also serve as important artifacts for compliance purposes

Clicking "Show All Attachments" will display attachments associated with other instances of this meeting. For new meetings, there will be none

Take Aways



- The main functions of the Meeting Module are Creating a Meeting, using an Existing Meeting, Adding an Agenda and Objectives, Setting the Resources expected to attend, and adding Attachments
- A New Meeting should be created when there is no Existing Meeting that matches the Agenda and Objectives intended to be covered
- When using an Existing Meeting, the Agenda/Objective, Notes, and Resources Attending carry forward from previous meetings, reducing the work necessary to conduct a meeting
- Multiple Objectives can be added, deleted, and described in detail using the Add Objectives button
- A Notes section can be added to the meeting during preparation
- Setting the Resources expected to attend the meeting in advance can help reduce the time needed to take attendance during a meeting
- Adding Attachments helps preserve the story of the meeting during review

