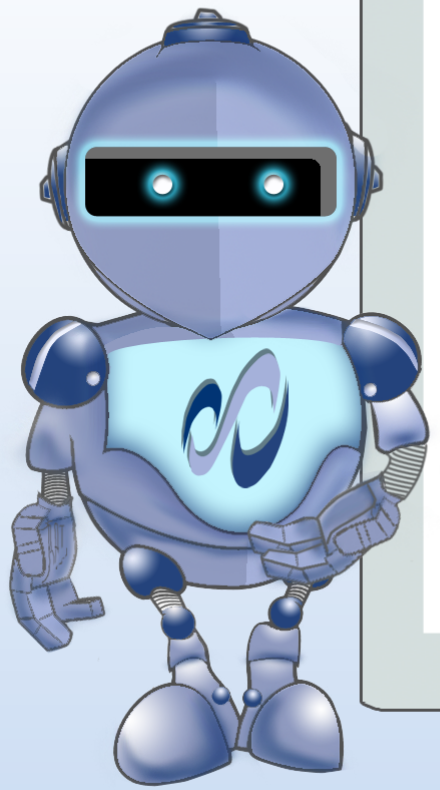
WTS Meeting Module Basics

WTS_U105_ITI

Learning Objectives

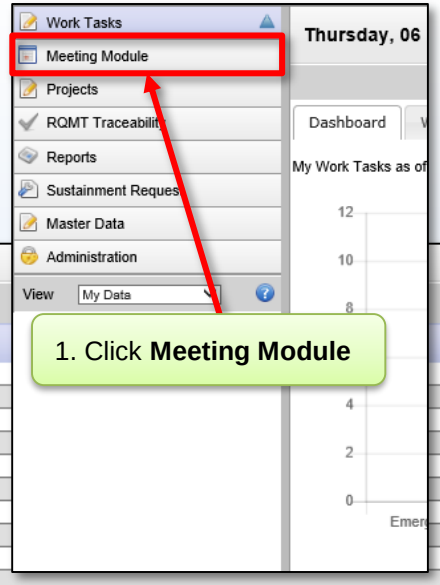


Upon completion of this course, you will:

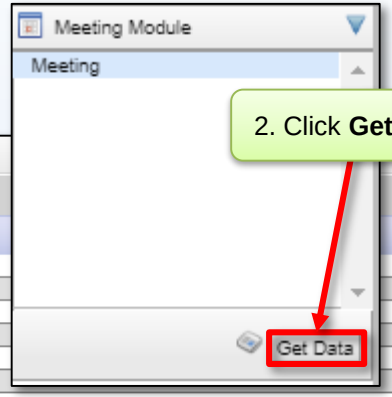
- Learn the main functionalities of the Meeting Module
- Know how to create a New Meeting and when to do so
- Discover how to navigate to an Existing Meeting and when to do so
- Learn to create an Agenda/Objective for a meeting
- Discover how to create a Notes section for a meeting
- Know how to set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



1. Click **Meeting Module**



2. Click **Get Data**

3. Click **Start Meeting**

Meeting

View: Week

Show Metrics

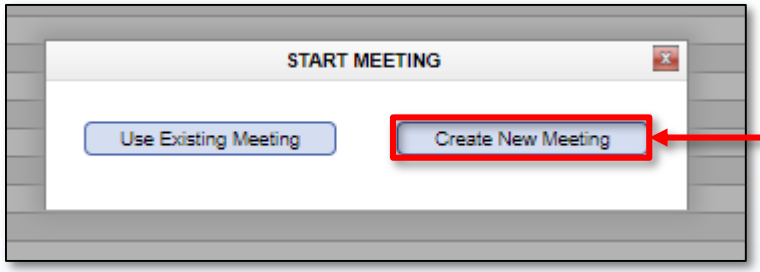
Start Meeting

Week	# of Meetings	# of Meeting Instances	# of AORs Involved	# of Resources Involved
	1	0	0	0
9/3/2018 - 9/9/2018	3	3	12	27
8/27/2018 - 9/2/2018	12	18	63	68
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”

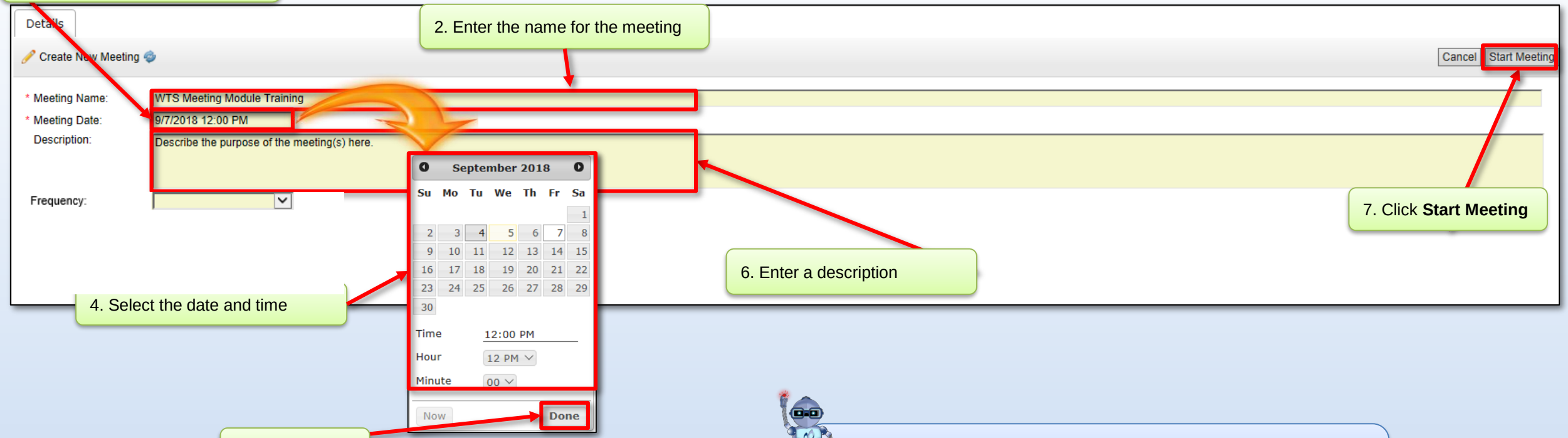
Creating a New Meeting



1. Click **Create New Meeting**

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

2. Enter the name for the meeting



7. Click **Start Meeting**

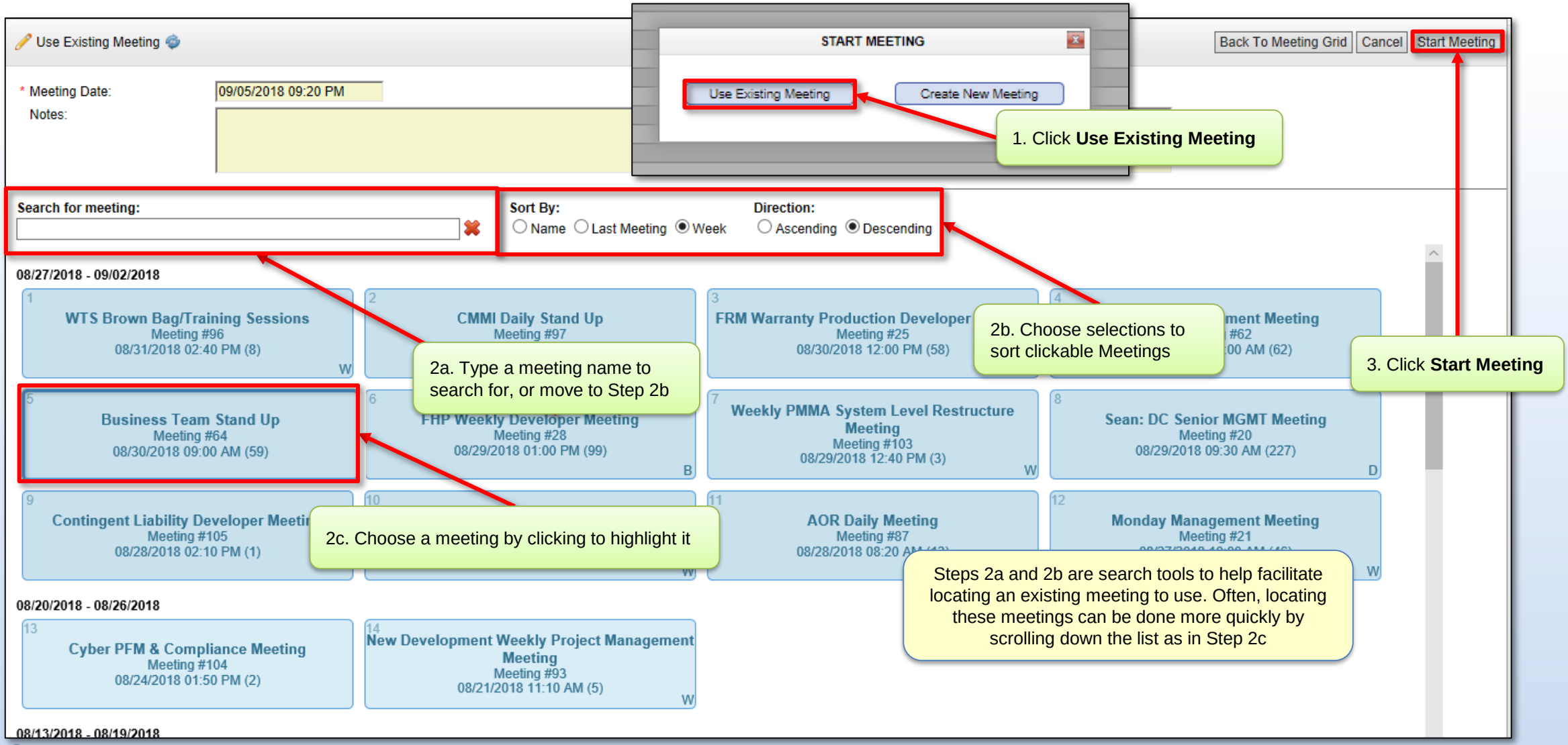
6. Enter a description

4. Select the date and time

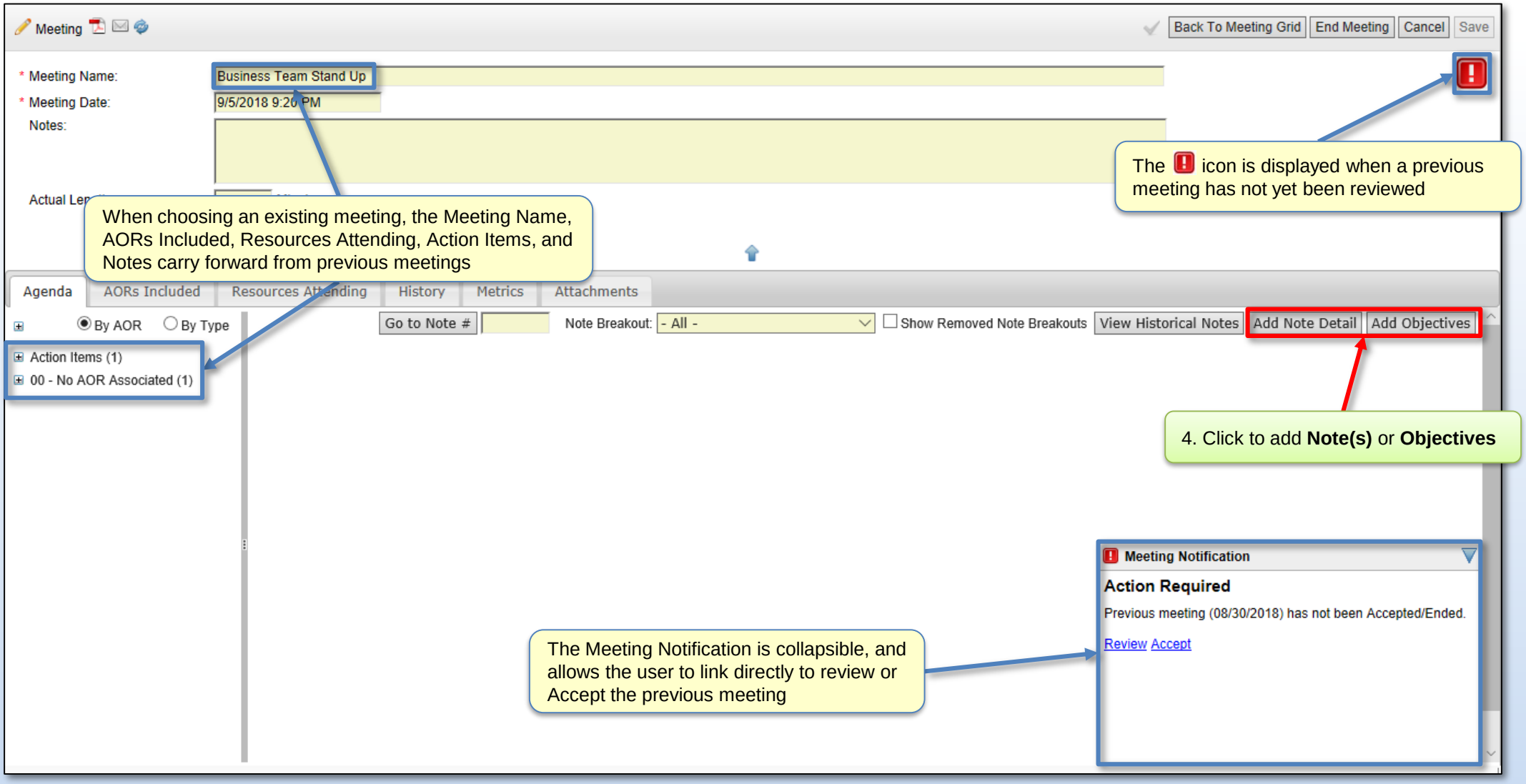
5. Click **Done**

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

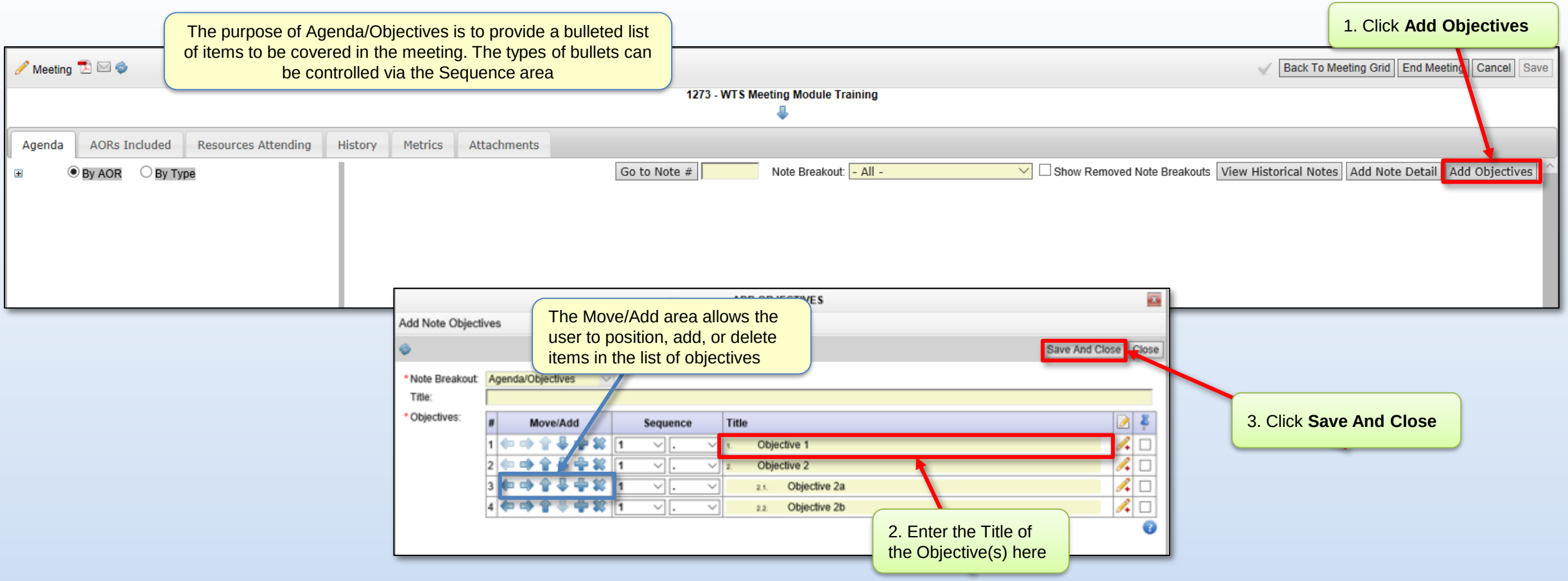


Using an Existing Meeting



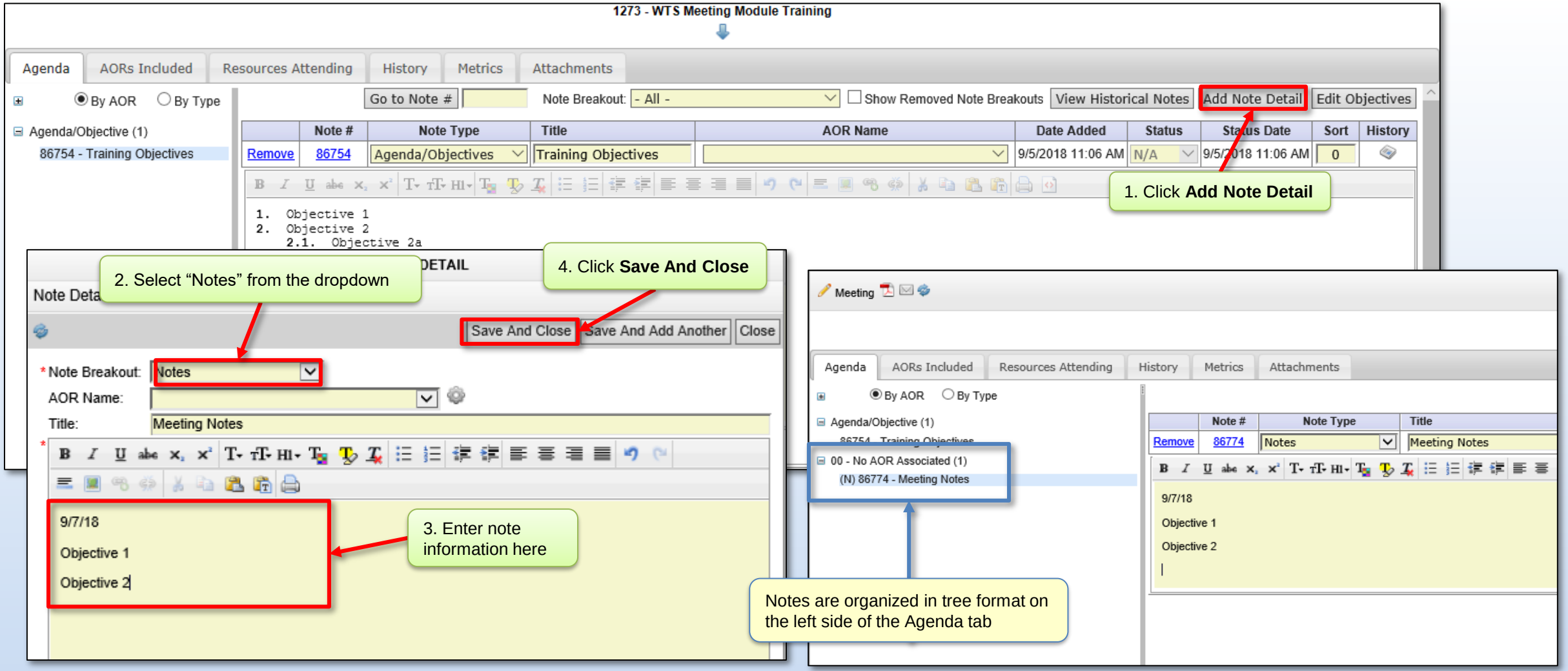
Adding Agenda/Objective(s)

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



Adding a Note

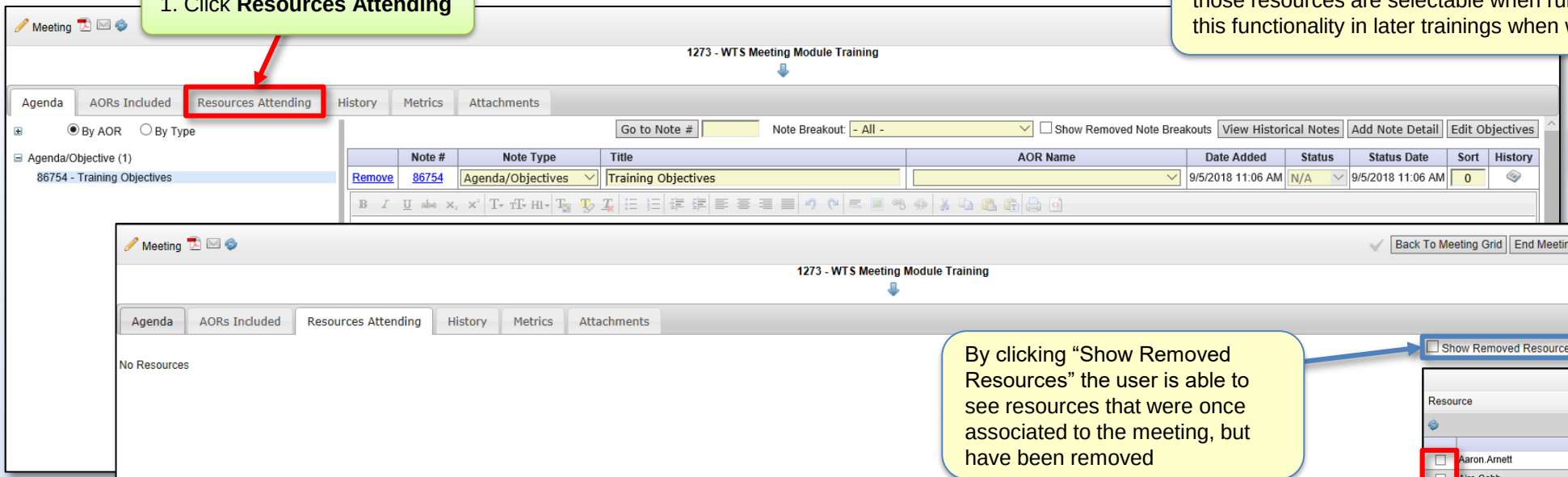
Key Information



Adding Resources Attending

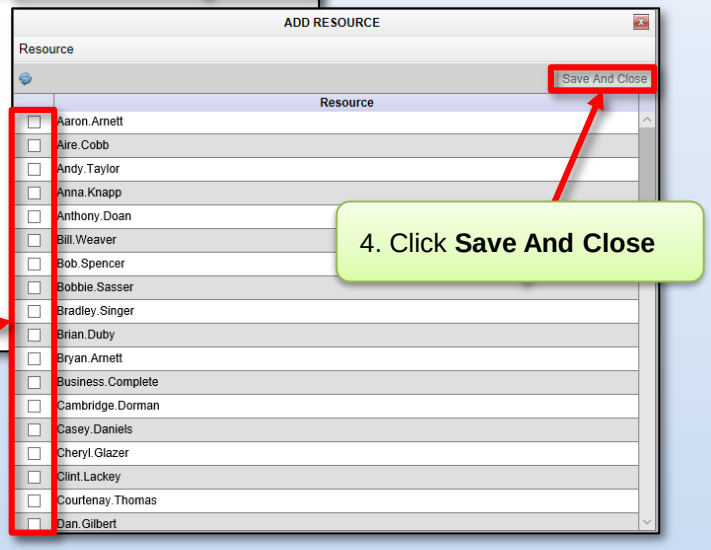
1. Click **Resources Attending**

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

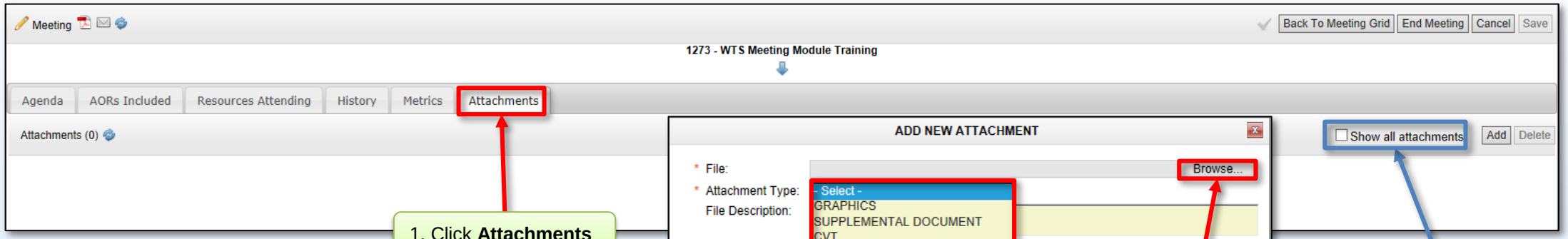


3. Select Resources expected to attend meeting

4. Click **Save And Close**

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



1. Click **Attachments**

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

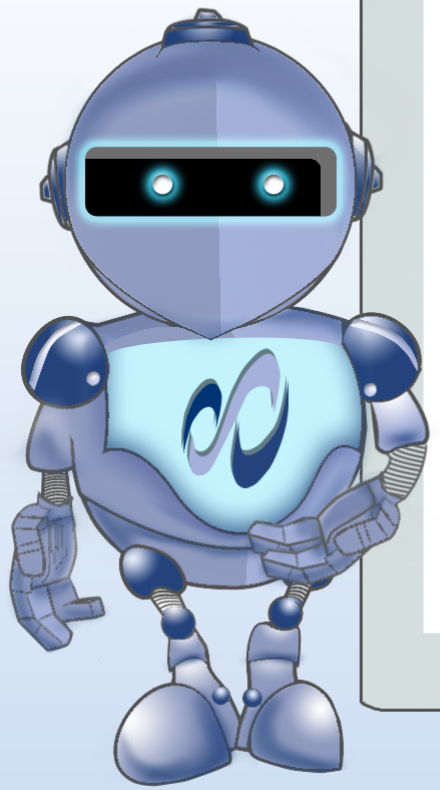
3. Select an Attachment Type

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