



## Meetingworks Sample Guide

This page intentionally left blank.

# Table of Contents

<b>Meetingworks “Free” Version</b>	<b>1</b>
Introduction .....	1
Getting Started .....	2
<b>Starting Chauffeur and Setting the Environment</b>	<b>3</b>
Opening Chauffeur .....	3
Loading the Sample Files .....	4
Opening the Agenda .....	4
The Meetingworks Sample Agenda .....	6
Printing an Agenda Report (Optional but Recommended) .....	7
Registering Participants .....	8
Windows Participant .....	10
Windows Participant—Pre-meeting .....	10
<b>Running the Sample Agenda</b>	<b>13</b>
Running Steps .....	13
What’s Wrong with Meetings? .....	13
OPENING/INTRODUCTIONS .....	13
Run slide show (optional) .....	13
Open parking lot .....	14
Problems with Traditional Meetings .....	15
List problems encountered in traditional meetings .....	15
Edit problem list .....	16
Rate problems for effect on productivity .....	17
Reduce list of problems .....	19
Electronic meeting benefits tutorial .....	20
List ways electronically-supported meetings can help solve problems .....	20
Edit list of solutions .....	21
ELECTRONIC MEETING ROOMS .....	22
Analyze impact of room types on goals .....	22
Choose sites for electronic meeting rooms (optional) .....	23
WRAP-UP .....	24
Cruise the parking lot .....	25

Print final report (optional) .....	25
<b>More about Chauffeur</b>	<b>29</b>
Modifying the Agenda from Chauffeur .....	29
Closing Chauffeur .....	30
<b>Appendix</b>	<b>31</b>
Sharing Workstations .....	31
Exiting the Windows Participant .....	31

# Meetingworks “Free” Version

---

## Introduction

When you download and install the free 5-participant license of Meetingworks from the web, you will have the capability of using the entire tool set for up to five Windows participants connected to your Chauffeur machine on a LAN.

There are two modules to download: Chauffeur and Participant. The Chauffeur package includes all of the tools you will need to create and run a Meetingworks agenda, along with the Word macros to create a report. It can be installed on your Windows machine that you plan to use to lead a meeting (all necessary server capabilities are included, so it doesn't require another server). The Participant code is meant to be installed on each Windows machine you want to use as a participant. These participant machines need to be connected to the Chauffeur machine on a LAN.

The free version of Meetingworks is always current and has no time limit.

The Windows participant is meant to be used in a face-to-face meeting where there is a public display. When you upgrade to the Connect version (paid mode), you'll be able to skip the Windows participant code if you want and have participants access the Chauffeur machine via a web browser. With Connect, participants can be seated in the same room or anywhere in the world and all relevant data will be visible on their screens (in their browser).

This document is meant to help you get started with the free version. The same sample agenda can easily be used with the

Connect version of Meetingworks (with additional features and options for participant registration).

---

## Getting Started

Once you have downloaded the free version (both Chauffeur and Participant modules), install them (Chauffeur code on your "leader" machine and Participant code on up to five Windows participant machines that are connected to the Chauffeur on a LAN).

On the Chauffeur machine, create a folder outside the Program Files path.

For example:

**C:\Meetingworks\Meetings\Sample**

---

**NOTE:** You may already have a C:\Meetingworks folder created during installation. If you took the defaults and have a recent version of Windows (e.g., XP, NT, 2000), Meetingworks recognizes this and creates a folder outside the Program Files path.

---

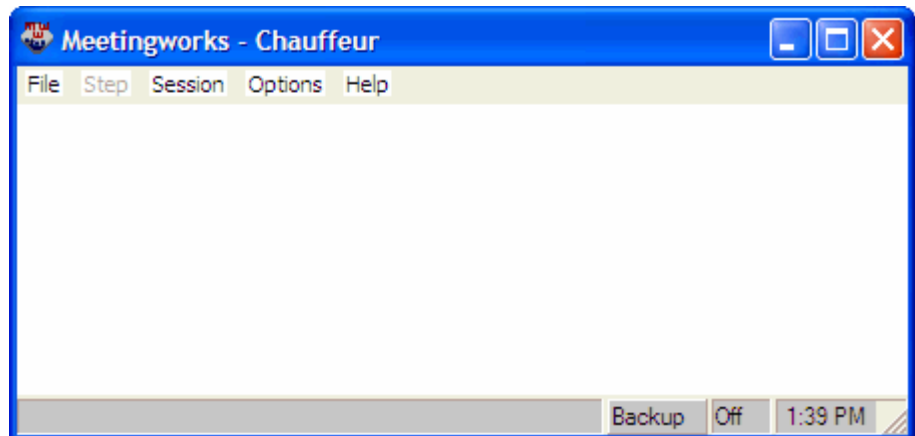
# Starting Chauffeur and Setting the Environment

---

## Opening Chauffeur



Open Chauffeur by double-clicking on the Chauffeur icon in the Meetingworks Program Folder.



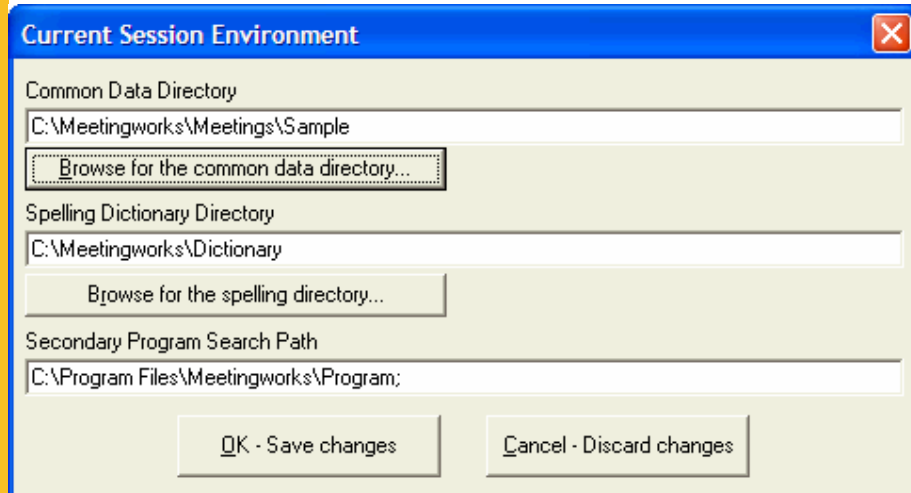
The Chauffeur window opens, displaying menus for use in running an agenda.

You can run an agenda from any folder you want.

To set the environment in Chauffeur, click *Session | Session environment*. The Current Session Environment dialog box displays.

*The Meetingworks Session Environment is the folder from which the meeting will be run. The folder contains the agenda file and all input files needed to run the meeting.*

*You might also want to save documents, slide shows, etc. in the same folder.*



Find the folder you want and click *OK*.

---

## Loading the Sample Files

Installation of Meetingworks created a folder called Program Files\Meetingworks\Samples. All of the files you need to run the sample agenda are contained in this folder. There are two options for loading the sample files into the folder you want to use for running the sample agenda:

### OPTION 1

Using Windows Explorer, copy all of the files in the Program Files\Meetingworks\Samples folder to your newly created folder (C:\Meetingworks\Meetings\Sample).

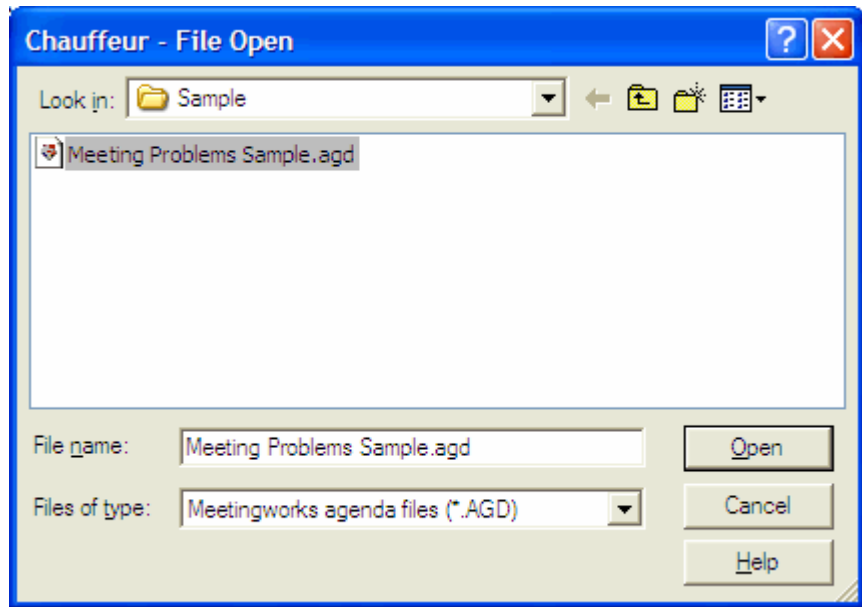
### OPTION 2

In Chauffeur, click *Session | Backup/load session files | Load session files*. Find the Program Files\Meetingworks\Samples folder and follow the Meetingworks prompts.

---

## Opening the Agenda

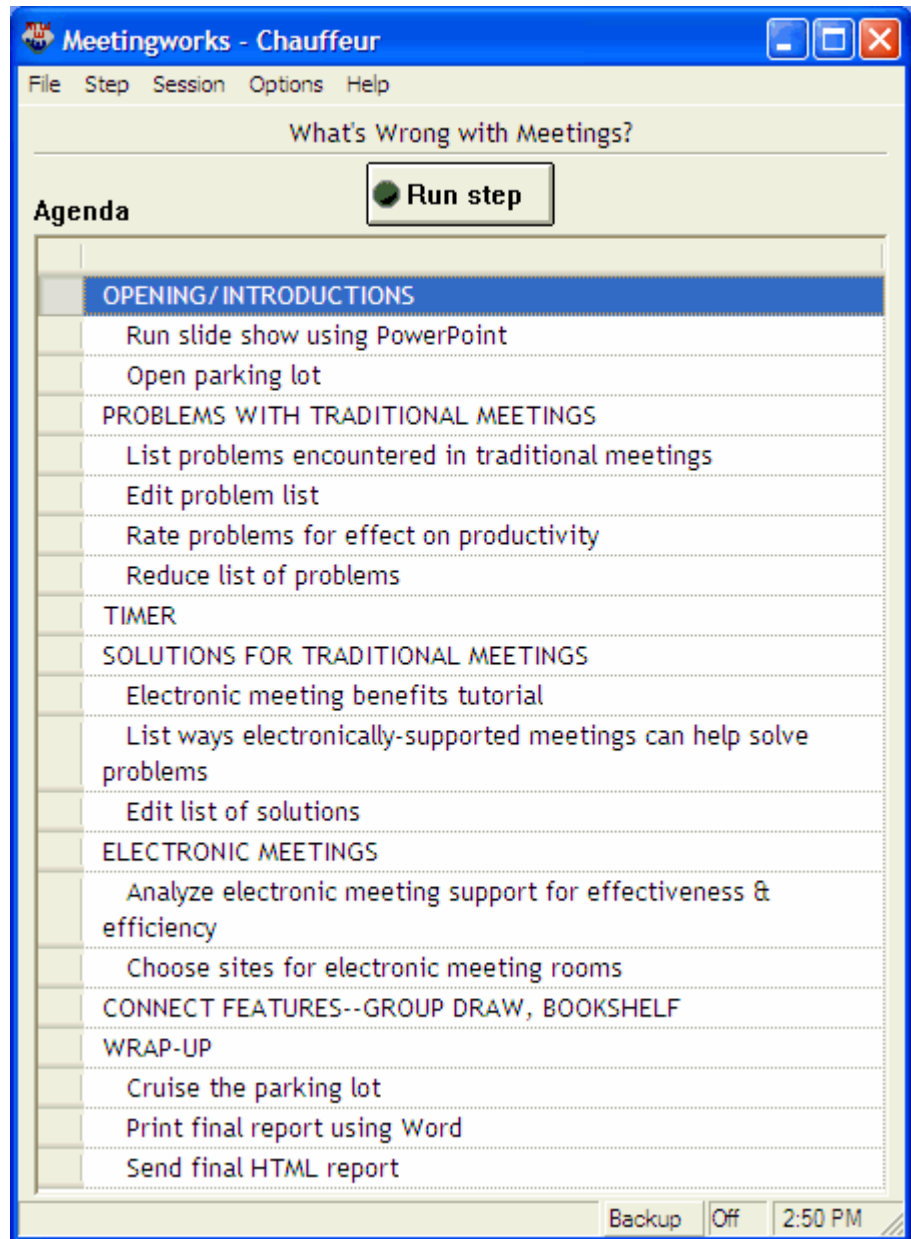
In Chauffeur, click *File | Open*. Select the agenda.



It is a good idea to run your agenda displaying the Meetingworks tool names (at least until you are comfortable with running the agenda).

To display the tool names click *Options / Display tool names*.

## The Meetingworks Sample Agenda



The sample agenda that you install with Meetingworks contains at least one of each type of step.

**NOTE:** Some of the steps in this agenda are meant to be used only with the Connect version (e.g., Connect Features, Send final HTML report)

## Printing an Agenda Report (Optional but Recommended)

The sample agenda contains instructions for running steps in an area called Facilitator notes. Although you can read these from Chauffeur (while running the agenda), it is helpful to print them out from the Meetingworks AgendaPlanner tool.



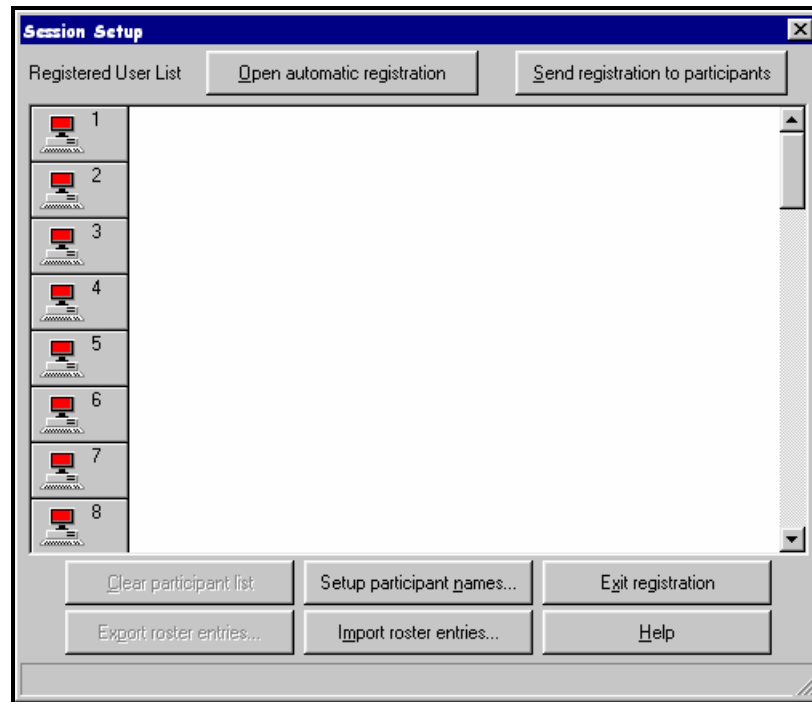
Open AgendaPlanner by double-clicking on the AgendaPlanner icon in the Meetingworks Program Folder. Click *File / Open* and locate the sample agenda. Once it is open, click *File /Print /Facilitator Notes*.

## Registering Participants

*The number of workstations that display in this dialog box depends on the maximum workstation count (Session menu, **Set maximum workstation count** option.)*

To register participants, click *Session | Set participant roster*.

The Session Setup dialog box displays.



To register a participant, **double-click** on one of the empty workstation icons.

The Participant Roster dialog displays. Enter the participant name and any other information you know or want to use as an affiliation during the meeting. Also choose a Participation Mode.

**Participant Roster**

Participant Name: Lee

Additional Information: Marketing

E-Mail Address:

Participant Status:

- Active participant
- Inactive participant
- Remove participant
- Move participant to:

Participation Mode:

- Local participation (Same time/same place and not internet)
- Same time Internet participation
- Different time Internet participation
- Reserve for same time Internet open registration
- Reserve for different time Internet open registration

Buttons: OK, Cancel, Help

**Participation Mode** Identifies the participant's mode.

---

**NOTE:** With the free version of Meetingworks, the only participation mode available is Local participation.

---

**Local participation (same time / same place and not Internet)** Designates a participant in a face-to-face meeting. This is the default.

Once you have completed the information for each participant, click *Send registration to participants* and then click *Exit registration*.

## Windows Participant

Once the chauffeur has sent registration, participants can access the meeting.

*Pre-meeting:*

*This is most often done by the chauffeur before the participants enter the room.*

### Windows Participant—Pre-meeting

Assuming you have set up a local area network (LAN), you can map a participant station to view the Chauffeur machine. In fact, Meetingworks Windows participant code prompts you in the mapping process if you choose to do so.

Once you have installed the participant code on a station to be used by a participant, start the participant and view the main screen:

*Status Messages:*

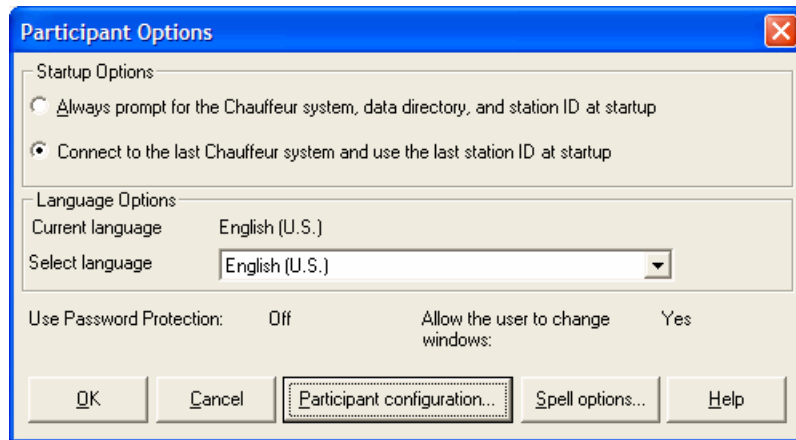
**Waiting for the Chauffeur** means either 1) Chauffeur isn't running or 2) there is a network problem.

**Waiting for instructions** means you are connected, but no tool has been sent to the participant.

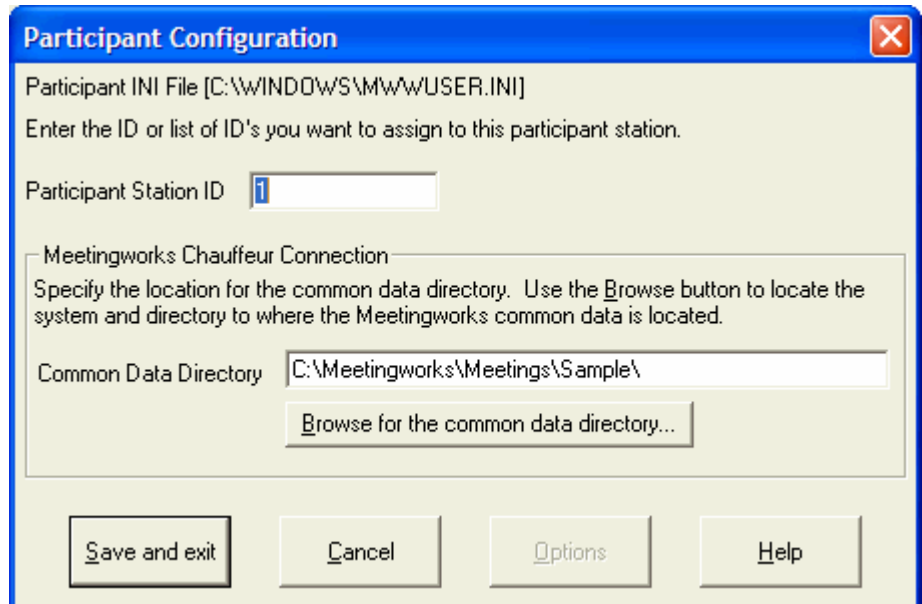


Click *Options*.

The Participant Options dialog box displays.



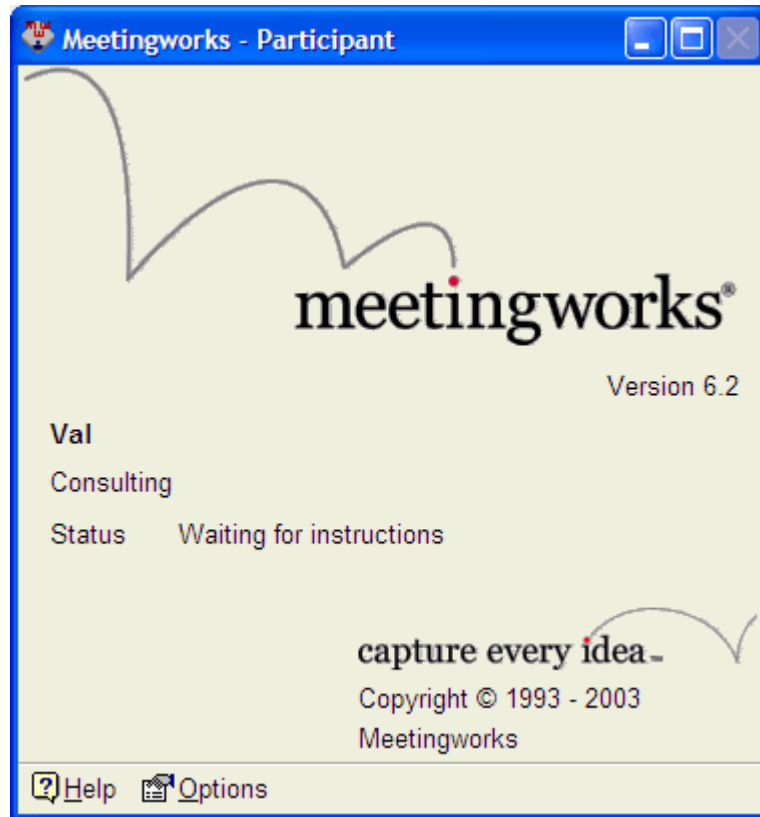
Choose a Startup option and a language to be used by this participant. Click *Participant configuration*.



Assign one or more participant station IDs and browse to find the common data directory (a.k.a. working directory).

Once you have set up this Windows participant, the name you registered in Chauffeur displays on the screen.

*If you happen to be sharing this workstation and have assigned multiple participant Station IDs to it, you will still just see one name on this screen.*



# Running the Sample Agenda

---

## Running Steps

To run a step, highlight it, and then either click *Run step* or press Enter.



---

## What's Wrong with Meetings?

The "What's Wrong with Meetings" sample agenda includes at least one of each type of Meetingworks tool. You may run all of the steps in the agenda or just those steps you want to see or practice on at any given time. If you do skip steps, remember that sometimes a step depends on steps above it for input files. You may also modify any of the steps to suit your needs.

There are several Manual steps in the agenda that are used as placeholders or section titles for the next few steps. A slide show can be run to review meeting objectives, ground rules, and outcomes. A "parking lot" will contain unfinished business or issues gathered throughout the meeting.

### **OPENING/INTRODUCTIONS**

You don't usually run a Manual step. If you do run this step, click *Enter* to end the step.

### **Run slide show (optional)**

This step will need to be modified to run on your Chauffeur machine. Double-click on the step and browse to find your

PowerPoint.exe program. Also, erase the Program parameters and browse to your current meeting folder to find the PowerPoint slide show.

---


**NOTE:** We suggest you either skip this step or run a slide show using PowerPoint from your desktop. The External Program tool works fine, but it is difficult for us to ship meaningful specifications for all clients to use.

---

When you are finished with the slides, click *File / Exit*.

## Open parking lot


To run the Organize step, click *Run step*. This step is set up to *Continue processing the agenda* (i.e., continue running throughout the meeting. Chauffeur will start the Organize step but you can minimize the Parking Lot and immediately “hot key” (ALT+Tab) to Chauffeur and proceed with the agenda. The Organize step used for Parking Lot will run in the background.

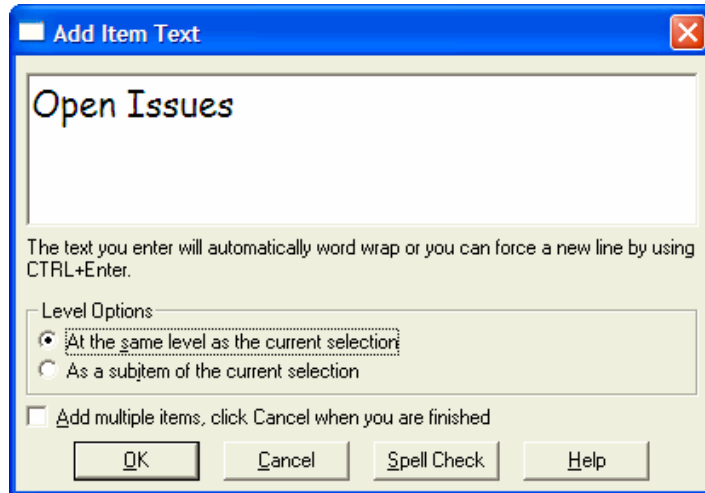
To use the parking lot, you can click on the minimized Organize tool at any time. The first time you use this parking lot, click *New* , or click *File / New*. The Specify Window Title dialog box displays.



Type **Parking Lot** in the text box and click *OK*.


## ***Adding and Editing Items in the Parking Lot***

To add items to the Parking Lot, click *Add* , or select the Edit menu and choose *Add*. The Add Item dialog box displays.



Type the item you want to add, and select the Level Option (same level as current selection or as a subitem of the current selection).

Click *OK*.

To edit an item, highlight it, and click *Edit* , right click and click *Edit item*, or click *Edit /Edit item*.

---

NOTE If you have entered items and you would like to save the items, click *File / Save to the default output file* to save the results as *Parking Lot.mw*. You can do this several times throughout the meeting.

---

## Problems with Traditional Meetings

Meeting tasks begin with a brainstorming tool (Generate). Participants type and send up to three items that interfere with the productivity of meetings. The group then discusses and edits the brainstormed items, producing a list of items to be evaluated. The chauffeur edits the list using the Organize tool.

## List problems encountered in traditional meetings

***Generate Step  
Instructions  
(single topic  
brainstorm)***

To run the Generate step, click *Run step*. This step runs in Chauffeur mode, and there is just one question for participants to answer.

Instructions to participants:

*“Send one idea at a time, each followed by the Send (F2) key.*

*To use the scratchpad, click Scratchpad (F7). To send items to the scratchpad before sending to the group list, click Send to scratchpad (F5). You can edit or delete items in the scratchpad; when ready to send, click on one or more of the items and click Send.*

*When you have reached your limit, your screen will display ‘Please wait’.”*

Once participants have finished, click *File | Save and exit generate*.

## **Edit problem list**

### **Organize Step Instructions**

To run the Organize step, click *Run step*. This step begins in Outliner mode, which shows all participant responses from Generate.

You can use Outliner mode throughout the discussion. Learn to open a second window (*File | New*) and tile the windows (*Window | Tile*). Drag unique items into the second window. Also, type in categories (Add item) in the new window and drag related items under the category name. The arrow keys on the Organize menu help move items (or use the ALT-arrows on your keyboard).

In this case, it might be useful to switch to Discussion mode. Highlight the first item on the list, and double-click on the word Outliner in the Organize Status Bar (bottom of the screen). The Set Organizing Mode dialog box displays.

Click on the Set Discussion Mode option and type 2 for the number of minutes to spend on each item.

Click *OK*.

The screen splits into two windows, the Discussion Item window and the Discussion Mode Results window.

Spend time editing each of the statements in the Discussion Item window using the Discussion Points listed (Is it clear?, appropriate?, unique?, singular?)

When you want to add an item to the Discussion Mode Results window, click *Add at first level* if you want to use this as a main

topic or the *Add at sublevel* if you want to add it as a subitem of a topic already placed in the window.

---

**NOTE** Try highlighting part of an item and adding just the highlighted text to the Results window. Also try adding an item to the Results window using the buttons and menus.

---

When you have completed the list in the Discussion Item window, click *Exit discussion mode*.

Organize is now back in Outliner mode, displaying the results of editing using Discussion mode.

Make any additional changes.

---

**NOTE** Try using buttons on the toolbar to indent items, turn numbering on, or spell checking.

---

When finished, select the click *File | Save* to the default file. The Default Output File dialog box displays. For now, ignore what is on this window. Simply click *OK*.

To exit the step, click *File | Exit organize*. Click *Yes* when prompted.

### **Rate problems for effect on productivity**

Participants then rate the list of problems created in Organize using a scale of 1 to 5, where:

5 = MAJOR DETERRENT TO MEETING PRODUCTIVITY

3 = SOME EFFECT ON PRODUCTIVITY

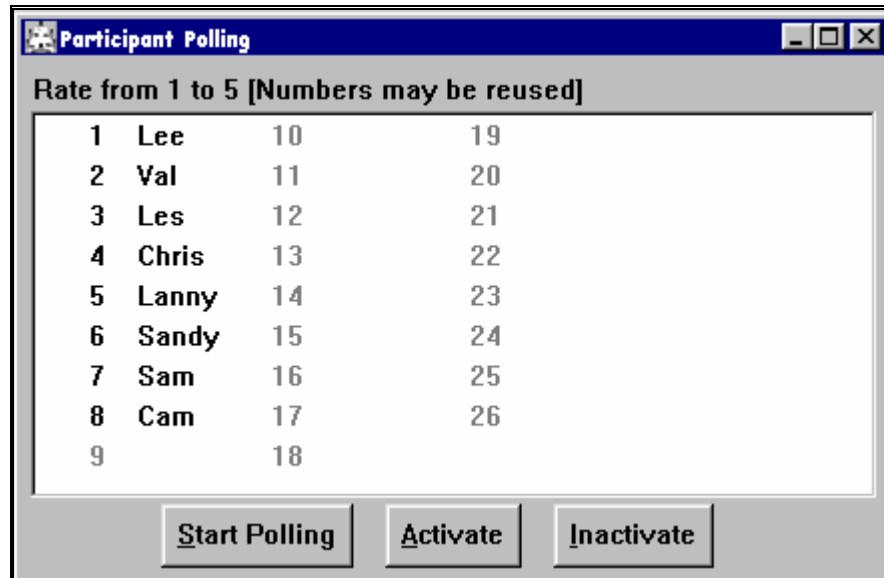
1 = NOT MUCH EFFECT ON PRODUCTIVITY

The results are reviewed to see the top-rated problems as well as how much agreement (variability) there is for each item. Graphs and comments are saved for the final report.

To run the Evaluate step, click *Run step*.

The Participant Polling dialog box displays. Describe the task to the participants and then click *Start Polling*.

**Evaluate Step  
Instructions  
Rating 1-5**



### Instructions to participants:

*"Type a number between 1 and 5 for each item (problem). You may also type an A to abstain.*

*To move from one line to the next, use the TAB key, the Enter key, or the down-arrow key.*

*To type a comment for an item, press the F4 key. Type the comment, and then press the Enter key.*

*At any time, you can sort your results by pressing the F3 key.*

*When you have rated each item, press the F2 key to send your evaluation.*

*Your screen will display 'Please wait'."*

Once all participants have sent their ratings, the Summary chart displays. The blue bars represent the average ratings and the red bars represent the variability, or degree of agreement. A tall red bar means there is little agreement.

Click on the bars on the Summary chart to view how each item was rated by participants. Markers indicate where you can find comments.

At any time, repoll one or more participants by selecting the Options menu and choosing *Poll participants*.

When you are finished viewing the results, click *File / Save as*.

The default graph file name displays **Summary - Rated Meeting Problems.wmf** in the File Name text box. Click on

the *Also save all distribution graphs as individual files* option. The Save All Distribution Graphs dialog box displays.

Type **Problem** in the File name prefix text box. Click *OK*.

To exit the step, click *File | Exit evaluate*. Choose *Yes* when prompted.

---

**NOTE** When the Report Title dialog box displays, it is OK to ignore it in this case. Click *OK*.

---

## Reduce list of problems

Using File Editor, the results from the evaluation are edited so that just the top problems are carried into the next part of the agenda, where solutions will be generated.

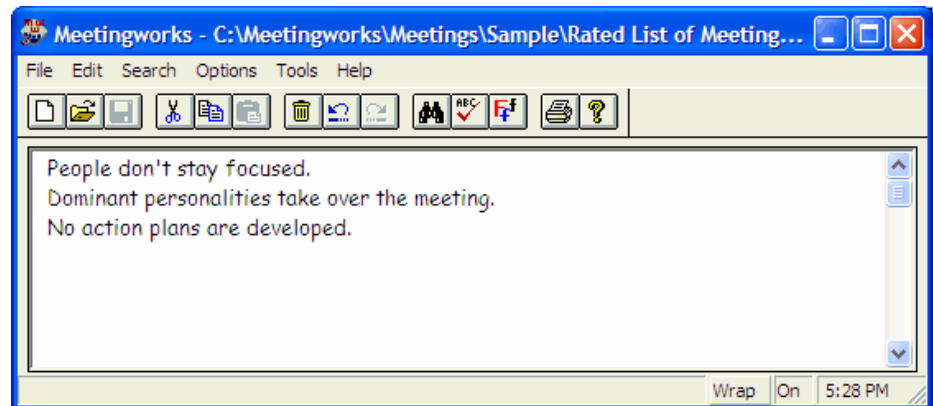
### File Editor Step Instructions

To run the File Editor step, click *Run step*.

The results from the Evaluate step display

Lead the group through an exercise to remove any items that received a low score (they aren't problems). To remove scores and variability, click *Edit / Remove scores and variability*.

After typing your screen might look like this:



When you are finished editing the file, click *File | Save to default output file*.

The file named in the agenda, prob4.mw, displays in the File Name text box. Click *OK*.

To exit the step, click *File / Exit editor*.

## Electronic meeting benefits tutorial

### Organize Step Instructions

To run the Organize step, click *Run step*. This step begins in Outliner mode, which displays the Benefits of Electronic Meetings.mw file (an outline file with sublevels) in collapsed form.

Double-click on an item to display the subitems. This tutorial will explain the benefits of using electronic meeting support to make traditional meetings more productive. This exercise should help participants think of solutions in the next Generate step.

When finished, click *File / Exit organize*. Organize will ask if you want to exit without saving and you can click *Yes* to exit.

## List ways electronically-supported meetings can help solve problems

### Generate Step Instructions (Multiple topics)

To run the Generate step, click *Run step*. This step runs in Participant mode, and there is a list of topics within which the participants may brainstorm ideas.

#### Instructions to participants:

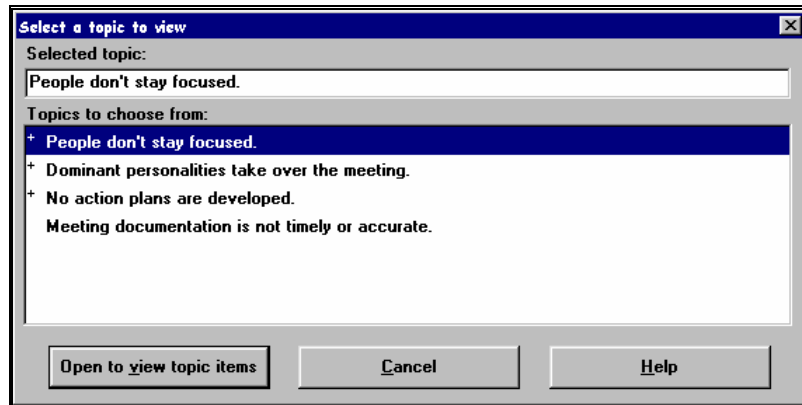
*“Send one idea at a time, each followed by the Send (F2) key.*

*To choose a topic to work on, click Choose topic (F9). The list of rated meeting problems displays. Highlight the one you want to work on, and press the Enter key.*

Because this step is running in Participant mode, no comments display on the Chauffeur screen (and public display) unless the chauffeur opens topic windows.

To open a topic window, select the View menu and choose *Open a topic window*.

The Select a topic to view dialog box displays.



Highlight a topic you want to open for viewing, and click *Open to view topic items*.

---

**NOTE 1** The plus mark in front of a topic indicates that there are comments for the topic.

**NOTE 2** Keep in mind that opening too many of these windows will confuse participants. Encourage them to use their F10 key to view the lists of submitted comments. It is usually advisable to open a maximum of 4 or 5 windows, then use the Windows option to Tile them. Once participants have finished, click *File | Save and exit generate*.

---

### **Organize Step Instructions**

## **Edit list of solutions**

To run the Organize step, click *Run step*. This step begins in Outliner mode, which shows all participant responses from Generate. The step displays items collapsed, and the topics for which participants have submitted comments in Generate display a plus mark.

To view subitems for a topic, double-click on the topic to expand its subitems. Through group discussion eliminate duplicates, edit, and add items as needed.

When you are finished editing the outline, click *File | Save to the default output file*.

To exit the step, click *File | Exit organize*. Choose *Yes* when prompted.

## ELECTRONIC MEETING ROOMS

This section of the agenda demonstrates Meetingworks' two analysis tools, Cross Impact and Multiple Criteria Analysis.

With Cross Impact, the participants rate a number of frequently touted benefits of electronic meetings against two types of meeting improvements, EFFECTIVENESS and EFFICIENCY.

Multiple Criteria Analysis is used to analyze some cities where this type of electronic meeting room should be introduced. In this step, some criteria are weighted, and then the cities are scored. Final results show the weighted scores.

### Analyze impact of room types on goals

#### Cross Impact Step Instructions

To run the Cross Impact step, click *Run step*.

The Participant polling dialog box displays. Click *Start Polling*.

#### Instructions to participants:

*"Rate each benefit (of using EMS) for EFFICIENCY and EFFECTIVENESS using a scale of -5 to +5. You can also enter comments by pressing the Comment (F4) key, typing your comment, and then press the Enter key to return.*

*Once you have completed rating for EFFICIENCY, click Choose Topic (F9) to select EFFECTIVENESS. Press the Enter key.*

*When finished rating both criteria, press the Send (F2) key to send your evaluation."*

When all participants have sent their responses the Summary table displays a grid. A Summary graph displays if desired (the button toggles it off). The columns are sorted from left to right using the total calculations in the last (sum) row. The rows are sorted top to bottom using the last (sum) column.

You can change the Display option by clicking on the down-arrow and choosing an option from the drop-down list box.

You can display summary charts by double-clicking in the top of a column or at the beginning of a row. For this example, display the column summary charts (EFFECTIVENESS and EFFICIENCY) and while viewing each, click *File / Save all graphs*. Here you have many choices for saving. If you want to try them all, first click *Save item (row) summary graphs*.

Type the prefix **CI Row**. Click *OK*. Repeat the process and click *Save topic (column) summary graphs*. Type the prefix **CI Summary Column**. Click *OK*. Repeat the process and click *Save topic and item distribution graphs*. Type the prefix **CI Item**. Click *OK*.

When finished viewing the results, click *File / Exit cross impact*. Choose *Yes* when prompted.

---

**NOTE** When the Report Title dialog box displays, it is *OK* to ignore it in this case. Click *OK*.

---

## **Choose sites for electronic meeting rooms (optional)**

### **Multiple Criteria Analysis Step Instructions**

To run the Multiple Criteria Analysis step, click *Run step*.

The Participant Polling dialog box displays. Click *Start Polling* button.

### **Instructions to participants:**

#### **WEIGHTS**

*"The list of criteria for opening an electronic meeting room are presented on a list. You have 100 points to spread across the criteria. Type a number in front of each criterion. Use the TAB key, the Enter key, or the down-arrow key to move to the next item. MeetingWorks keeps track of how many points you have used and how many are remaining.*

*You can also enter comments by pressing the F4 key, typing your comment, and then press the Enter key to return.*

*When you have weighted all the criteria, press the Send (F2) key to send your evaluation."*

When all participants have sent their responses, a message will display asking if you want to view the weighting results. If you choose *No*, the Participant Polling screen for scores displays. If you choose *Yes*, the Summary chart for Weights displays. The blue bar represents the average value for the weights. The red bar represents the amount of agreement (variability).

When you are ready to have participants score the alternatives (cities), select the Options menu and choose *Poll participants for scores*.

## **Instructions to participants:**

### SCORES

*“The list of alternatives (cities) are presented on a list. Each will be scored against each of the criteria.*

*For each criterion, you must award one alternative (city) a 100 and one alternative (city) a 0. All other cities can be scored anywhere from 0 to 100.*

*This technique places equal value on each participant’s first choice and each participant’s last choice. It is not intended to award 100 points to the item per se, but instead to put a relative placement of values on the alternatives.*

*Once you have completed work for the first criterion, press the F9 key to click next criterion. The next criterion is automatically highlighted. If this is the one you want to work on next, press the Enter key.*

*When finished rating all criteria for each of the alternatives (cities), press the Send (F2) key to send your evaluation.”*

When all participants have sent their responses the Final Scores Detail displays. In the grid at the bottom of the screen, the columns are sorted from left to right using the total calculations in the last (sum) row. The rows are sorted top to bottom using the last (sum) column. The total column represents average scores times average weights using the Group Mean method.

As with Cross Impact, you can double-click on cells within the grid to “drill down” to information you want to view. Try using the various display options, filtering options, menus, analysis methods, and scenarios.

## **WRAP-UP**

Before ending the meeting, the chauffeur shows the Parking Lot to make sure all issues have been addressed in action plans.

A final report is generated using formatting commands provided with MeetingWorks.

## Cruise the parking lot

To display the Parking Lot window, maximize it.

Near the end of the meeting, it is a good idea to look at any items to decide if there are any action items to be recorded, or if any items can be removed from the Parking Lot list.

When you are finished, click *File | Save* to the default output file. The contents are saved as Parking Lot.mw and can be printed in your final report or used in any other document.

When you are finished with the Parking Lot, click *File | Exit organize*. Choose *Yes* when prompted.

## Print final report (optional)

This step will need to be modified to run on your Chauffeur machine. Double-click on the step and browse to find your Winword.exe program. Also, erase the Program parameters and browse to your current meeting folder to find Meeting Problems Shell.doc.

---

**NOTE:** A simpler method is to start Word from your desktop and browse to find the Meeting Problems Shell.doc in your meeting folder.


---

### **External Program Tool Step Instructions**

To run the External Program Tool step from the agenda, click *Run step*. Word will open the document shell named in the Meetingworks agenda.

Once the document opens, it is a good practice to immediately save the document with a new name, thus preserving the formatting commands in the shell document for reuse.

To save the document with a new name, click *File | Save as*. Type a new name in the folder you want to use.

Click on Meetingworks toolbar icon  (Run formatting commands).

When you ran the agenda, meeting results were recorded in the **Meeting Problems.rpt**. Other files you saved are also available to insert into the final meeting document.

*Run formatting commands* searches for all MWCommands within the document and processes them sequentially, replacing the MWCommand with the specified data, and formatting it as indicated in the formatting dialog boxes.

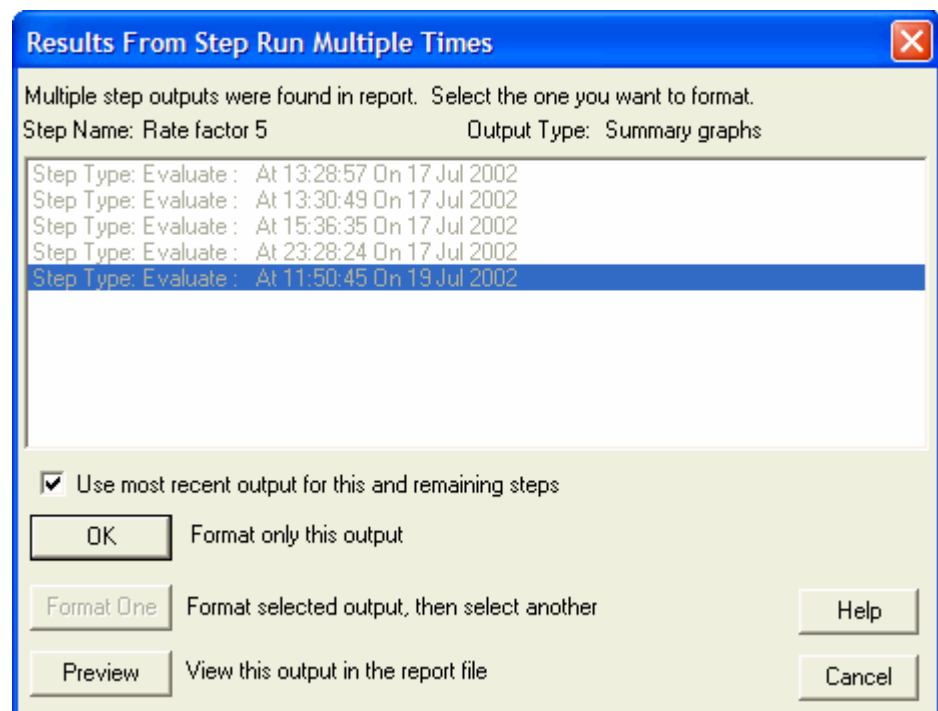
If the specified data is not available, *Run formatting commands* leaves the MWCommand and moves to the next one.

### **Choosing from Multiple Step Outputs**

There may be multiple outputs found in the report for a given step. Multiple outputs can result when:

- The step was run more than once during the meeting. For example, you may have run an Evaluate step a second time if the item list was changed after one evaluation.
- The step was run when you rehearsed the agenda and you did not refresh the report file.
- Multiple outputs were saved while the step was being run. For example, you may have chosen to reevaluate data using a different criterion during an Evaluate step. Or, you may have saved multiple files to the report file during an Organize step.

When multiple outputs are found, the Results From Step Run Multiple Times dialog box displays.



A list of the outputs that were found for the step in the report file is displayed. The step type, time it was run, and step name are listed. If you created more than one output of a

step while running the step, additional lines will be shown listing the output number and the time it was created.

Select the output you want to insert in your document by using the up and down arrow keys or the mouse to highlight the item. Then click *OK*.

### **Choosing from Saved Graphs**

There may be multiple graphs found in the report for a step. The Select Graphs to be Formatted dialog box displays.

Choose graphs you want to insert from the list box:

**OK** Formats only the selected graph. Highlight a graph on the list and click *OK*.

**Format one** Formats the selected graph, then allows you to select another to be formatted, without leaving the dialog box.

**Format all** Formats all graphs on the list.

When the *Save All Distribution Graphs* option in an Evaluate step was used, the list of graphs can be narrowed to include *only* the graphs with the File name prefix specified.

**File name prefix** Specifies a text string to use to select a subset of the list of graph files saved in the Evaluate step.

**Number of columns** Sets up columns into which the graphs will be inserted.

**Redisplay** Displays the list of graphs using the File name prefix specified.

Now that you have inserted your meeting results, you can modify the report in any way you want. We recommend that you save it with another name (e.g., **Meetings Demo Final Report.doc**).

---

**NOTE** If you ran the sample agenda but used different names for graphs, your file names might not be listed when the Select Graphs to be Inserted dialog box displays. To correct this, you may need to edit the shell document. For example, if you did not use the prefix **Problem** for the distribution graphs, you can use the *Find/Replace* option to change references to **Problem** in the shell document to reflect your naming convention.

---

For the Cross Impact step, you can insert all the graphs you saved. The simplest way is to type a 2 in the number of columns text box, then click *Format all the graphs in the list* button.

Try using other options. Type a prefix (e.g., CI Summary by Row) in the prefix text box and click *Redisplay*. Type a 2 in the number of columns text box, and then click *Format all the graphs in the list* button. Repeat the process for the other graphs you saved.

There are several ways you can improve the appearance of your document. Now that all the meeting data is formatted, you are strictly working with your word processing application. You can change the fonts, font sizes, styles, column sizes and names, picture sizes, page breaks, headers, and footers.

***Recommendations (using Word commands):***

Change the size of the Evaluate Summary chart. Highlight the picture, select the Format menu, and choose *Picture*. Change the size to 50% by 50%. Click *OK*.

Change the table formats to a fancier format. Select the table. Select the Table menu, choose Table AutoFormat. Choose a format you like. Click *OK*. (You can also highlight the heading row, center the text and bold it.) It is also a good practice to change the Table Titles to reflect what is really in the columns (e.g., Problems instead of Item #).

Check the pagination. Add Page breaks wherever necessary to make a more readable document. New topics should begin on a new page.

Build a Table of Contents. Highlight the current Table of Contents with the left mouse button. Click on the right mouse button and click *Update field*.

# More about Chauffeur

---

## Modifying the Agenda from Chauffeur

**Store Updates** stores the changes you make to the agenda until you actually close the agenda.

Modifications made to the agenda from Chauffeur are not saved unless you click *File | Save as*.

If you need to modify a step before you run it, double-click on it to open up the tool dialog. Make changes to any option or field that isn't "grayed out".

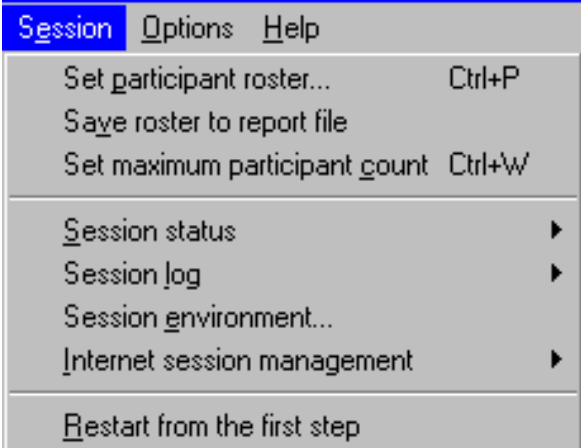
You can either click *Run the step* or *Store updates*.

**Session status** helps you save and restore meeting data.

**Session environment** shows directory and path information.

**Restart from the first step** erases check marks next to steps you have run.

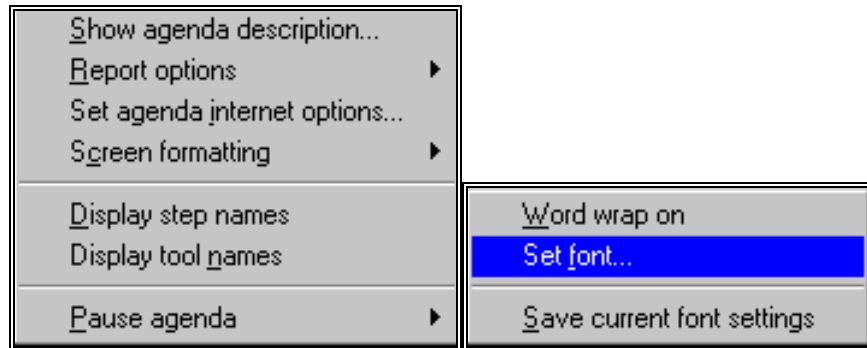
### The Session Menu



## The Options Menu

**Report options** assist you with testing an agenda, and then erasing test results to begin a meeting.

**Display options** determine how your Chauffeur screen appears during a meeting.

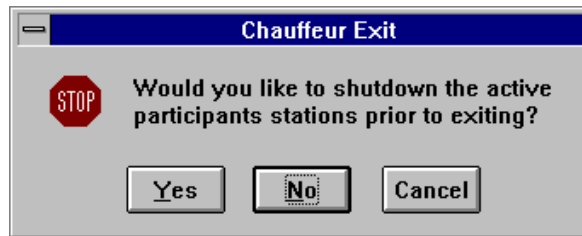


---

## Closing Chauffeur

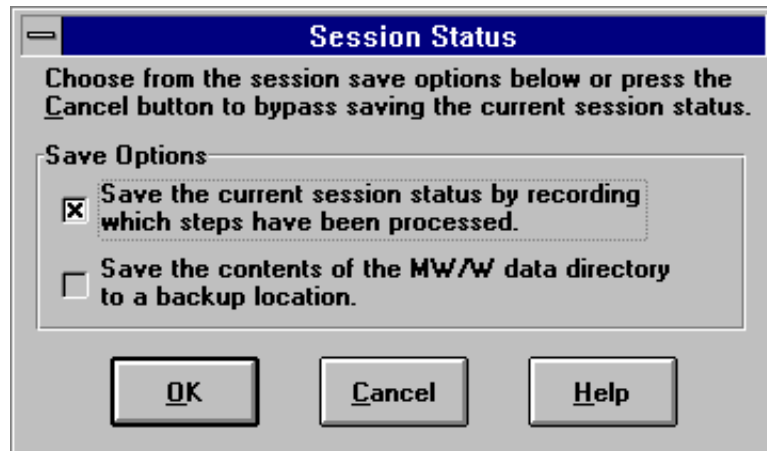
Close Chauffeur by clicking *File | Exit chauffeur*. A series of dialog boxes display. Some of them are:

If you are finished with the workstations, click Yes. If you do not want the participants to exit, click No.



**Session Status** asks if you if you want to "record" the status (retain the check marks by the steps).

If you want to backup your meeting data at this time, Click the second box. You can perform the backup using *Chauffeur* menus as well.



# Appendix

---

## Sharing Workstations

If you want to share workstations, you can press **CTRL+S** on a station to display the Participant Setup Information dialog box.

*The **maximum participant count** (Chauffeur session menu) must reflect at least the total number of participants you plan to register.*

*Your license for Meetingworks will dictate the maximum number of participants you can register for a meeting.*

Participant Setup Information

Common Data Directory: D:\Proddata\demos\Problems with Meetings  
Browse for the common data directory...

Spelling Dictionary Directory: C:\Meetingworks\participant\Dictionary  
Browse for the spelling directory...

Current Station ID List: 1,2,3

Local Temporary Directory: C:\Meetingworks\participant\Local  
Browse for the local temporary directory...

Secondary Search Path: C:\PROGRA~1\MEETIN~1\PARTIC~1;

OK Cancel

---

## Exiting the Windows Participant

*This keystroke combination is **not** published in the online Participant Help.*

To exit the Meetingworks Participant screen, press **CTRL+X**. You will be prompted Yes/No if you really want to exit.