



WebIQ 4.0 Session Leader's Guide

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About WebIQ

Organizations today face an increasing “need for speed” in innovation. Innovation drives decisions and follow-up actions. WebIQ helps organizations meet this need by offering a structured, collaborative decision-making process with which people can quickly gain input from all stakeholders and come to actionable conclusions.

Because a WebIQ Session is self-documenting, all input leading to a decision is contained and available to all Participants at the click of a mouse. WebIQ allows for the implementation of a common, reusable process throughout an organization.

WebIQ puts all Participants on a level playing field. In offering the option of anonymity, WebIQ ensures that all ideas are on an equal footing by eliminating the issue of whose idea it is. Unlike a traditional setting where people meet around a conference table and take turns speaking (serial input), WebIQ allows for parallel input of ideas. Ideas are input as they are thought of without having to wait for someone else to finish talking.

WebIQ keeps people out of the smart-talk trap. It’s human nature to substitute talk for action. The problem is especially evident in meeting rooms. WebIQ provides focus and moves people through the decision-making process towards action. By documenting ideas and their associated goals and objectives, WebIQ provides a common reference for all Participants to understand goals and objectives and track the status of an action plan improving buy-in from all Participants.

WebIQ increases innovation velocity and decreases lapsed time between problem identification and decision. WebIQ provides an easy-to-use, flexible structure that is self-documenting with an Agenda framework that is familiar to all Participants.

Overview

WebIQ can be used for simple, one-time electronic meetings or to create and manage complicated decision-making processes. These decision-making processes can occur over a number of Sessions and over an extended period of time. For example, a complete strategic planning process can be designed and carried out with a group of planners using WebIQ. These planners can share knowledge, identify and evaluate priorities, and come to a consensus on strategic direction.

WebIQ Sessions begin with the design and setup of a Session and its Agenda. The Agenda is a set of Topics and Activities that embodies the particular decision-making process. An example of a Topic could be “Product Features.” An example of an Activity could be electronic brainstorming to gather suggestions for the product features. A Session Leader can either create an Agenda from scratch or clone a Session based on a selected Template.

Once the Agenda is ready and the Session Participants have been identified, each Participant is automatically sent an email message inviting him/her to join the Session. Participants join the Session by clicking on the web address in the email. They can participate at any time and from anywhere.

All Participants have access to several communication features throughout the life of a Session. Participants can send instant messages, send emails to each other, talk together via chat, and express their views about the Session.

WebIQ works with any browser, but can best be viewed using MS Internet Explorer. WebIQ uses a pop-up window to maximize computer screen real estate. As such, it requires pop-up blockers to be disabled. Upon detection of such software, a message will refer the user to information on disabling their pop-up suppression software for the duration of their WebIQ session. WebIQ also supports a non pop-up mode that offers a lower screen real estate solution for participants unable to disable their pop-up suppression software.

The User Login prompt contains a **forgot your password?** option, on which users can click if they have forgotten their passwords.

What's New in WebIQ 4.0?

The main enhancements provided in WebIQ Release 4.0 are the Collobwrite Activity and the Tables Activity. There are also some Session management enhancements, including a revised Action Plan Activity, improved transfer features, drag and drop improvements, and an online Session Leaders Guide.

Collabwrite Activity

This is WebIQ's new activity for composing, modifying, and updating Microsoft Word-like formatted documents. The Activity presents a full-page editor, into which Microsoft Word documents can be directly pasted. The Editor has numerous formatting features, such as **Bold, Italics, Fonts, Font Styles, Alignment, Auto-Numbering, Auto-Bulleting, Indenting, Coloring, Hyperlinks, Tables, and Images**. Most of these features are available from a tool-bar immediately above the editor screen. Images, before being pasted into documents, must first be uploaded to WebIQ using a "Image Library" feature at the bottom of the screen. Images uploaded to the Library can then be inserted into your documents using the Image button in to editor toolbar.

Tables Activity

Tables is a new activity for brainstorming or otherwise entering data into a structured table format. The new activity requires non-empty column headings for all columns in the activity, which will correspond directly to Categories in other activities. Below the column headings are any numbers of rows for entering text, numeric, or simple formulaic data.

The Table Tool is a true collaborative activity. Each cell in a table is modified by clicking on the cell with the mouse, which will cause an editor box to appear at the bottom. The text, numeric data, or formulas can be entered or pasted in this box and submitted. Changes will be made immediately available to all participants.

Improved Action Plan Activity

The Action Plan activity has been greatly enhanced to make it easier to use and more collaborative. Action Plan items are no longer edited and submitted all at once on a single activity screen. Instead, each item will have its current status data displayed, along with a Modify button which, when pressed, will allow that item's data to be

changed without affecting the other items. Changes to modified items will be instantly reflected in the activity screen.

The item status data has been modified as well. Start and End Dates have been replaced with a Start Date and Duration (in days). While the Start Date works as in previous versions, the End Date will be automatically calculated after entering a Duration value greater than or equal to 0.

Dependencies have also had a new feature added. In addition to the familiar ability to make an item directly dependent on another specific item, you will be able to make an item dependent on its relative “previous item” on the activity list. In other words, if the item numbered 4 on the activity screen is designated as being dependent on the “previous item,” it will always be dependent on item 3. This can be changed by simply moving item 4 up or down on the list - it will always be dependent on the item previous to it. If every item but the first one has been so treated, the Action Plan activity can, based solely on the Durations entered for each item, automatically calculate the Start date for each subsequent dependent item based on the Start date of the first.

Improved Transfer Features

Categories and Ideas in a source Activity can now be automatically demoted to Ideas and Comments in a destination Activity during a transfer. This is done by selecting “Categories & Ideas” as the Source Ideas type, and “Ideas” as the Destination Ideas type on the main Transfer screen. Similarly, Ideas and Comments can be promoted in a destination Activity. This is done by selecting “Ideas” as the Source Ideas type, and “Categories” as the Destination Ideas type, while selecting “Transfer Comments” on the Advanced Transfers tab.

Another new feature in Transfers is the ability to combine the results from evaluation-type Activities (such as Rate, Questionnaire, Vote, etc). The Activities must be of the same type (both Rate, both Vote, etc) and the destination Activity must contain copies of the same evaluated ideas as the source, through either the Copy command, loading an Activity from a WIQ file, or through the Transfer itself. By fulfilling these requirements, and selecting the “Transfer Results” checkbox on the Advanced Transfers tab, the results from the Source Activity(s) will be merged with the results in the Destination Activity.

Miscellaneous Enhancements

Drag and Drop Improvements

The ability to drag and drop ideas, categories, and other items in the several Activities has been greatly enhanced to allow activity data to be more easily organized. We have previously been able to re-order ideas and categories by using drag and drop. We have also been able to re-categorize ideas. We will now be able to include comments in our dragging and dropping. Dropping an item onto a peer item at the same level (such as comments of the same idea) will re-order the items with respect to each other. Dropping an item onto a “non-peer item” at a different level (such as a different idea, category, or a comment of a different parent) will automatically promote or demote the item as appropriate, effectively moving the item around. This will make it much easier for Session and Activity Leaders to organize the data in an activity.

Enhanced Session Searching Ability

The Search/Replace feature from the previous version, available in Session from the Session Menu, has now been split into two steps. The first step is the search screen, which now allows the sessions in the same entire Group to be searched. The results of the search will be shown on a second screen, where the results can be analyzed, and/or replaced with a new text string.

Score Activity Changes

The Score activity will now display its drop-down options in the same way as the Rate activity, namely in descending order. Score will also allow decimals to be included in Criteria Weights, such as 3.5, 0.02, etc in addition to the plain integer values we are used to using up to now.

Merge and Delete Screen Numbering

The Merge and Delete Multiple Ideas screens will now display numbers the way they do on the main activity screens.

Agenda Numbering

The Session Settings screen now provides options for using different numbering schemes in your Agendas. The numbering schemes can apply to both Topics and Activities, similar to the way Categories and Ideas are numbered in the Activities.

Closure/Session Report Additions

A special report for Chat sessions is now available on both reports. Activity instructions are now a separate reporting option under the Session Report screen.

Topic Adding Screen

A new pop-up screen provides a larger text area for adding and editing Agenda Topics.

New Animated Progress Screens

Animated progress screens, like the ones we've become used to for loading attachments or WIQ files, can now be seen on the Transfer screen, as well as in the new Collabwrite Activity.

New Lock-Step Feature

The "Online" pop-up will now display an asterisk "*" next to participants who are in Activity Result screens, as opposed to the Activity screens.

New Activity Features

When in an anonymous activity or session, regular participants will no longer need to hit the "Comment" button in order to add a comment to a selected idea or item.

Session and Activity Leaders will now also be able to set a "maximum depth" for participant commenting. This is to limit the growth of "commenting trees".

New Help Feature

WebIQ 4.0 will include an HTML version of its Session Leaders Guide within the Help Menu.

Group Management

Overview

Groups are used to organize sets of people who most commonly collaborate together. Typically, a Group Leader will create Groups that logically reflect the basic types or sets of issues that he/she is trying to address. For example, a Group Leader might have a Marketing Group, a Budget and Planning Group, etc. Therefore, a Group name might be “Marketing,” while that Group’s Roster would contain individuals from the Marketing department. Sessions and Session Templates are also associated with specific Groups.

When defining or setting up a Group, a Group Leader creates the Roster of Participants by either creating new Participants or importing Participants from another Group. Additionally, Participants can be imported using a Simple Mail Transfer Protocol (SMTP) import function, or an MS Outlook ® (version 2000 or greater) contact file. The Sessions later created within a Group are not restricted to those Participants within the Group’s Roster. Consequently, Groups are a convenient but nonrestrictive way to associate Participants and Sessions.

Creating Groups

A Group Leader can quickly create a new Group. Since each Group is identified by its name, the name typed should be as descriptive as possible to accurately reflect the purpose of the Group and the composition of the Roster. Once the name of the Group is defined, it will appear in the list box, and is then available for modification. Group Rosters are automatically alphabetized for easy reference, by last name first.

Creating a Group

1. From the Main Menu, click the **Group Administration** link.
2. Click the **New Group** button.
3. **Type** the Group’s name in the resulting dialog box. Click **OK**.
4. The **Create New User** screen will appear. Adding a new user is explained in the next section.
5. Clicking **Done** from the **Group Administration Screen** will send the Group Leader back to the main menu.



Group Administration Screen

Modifying the Group

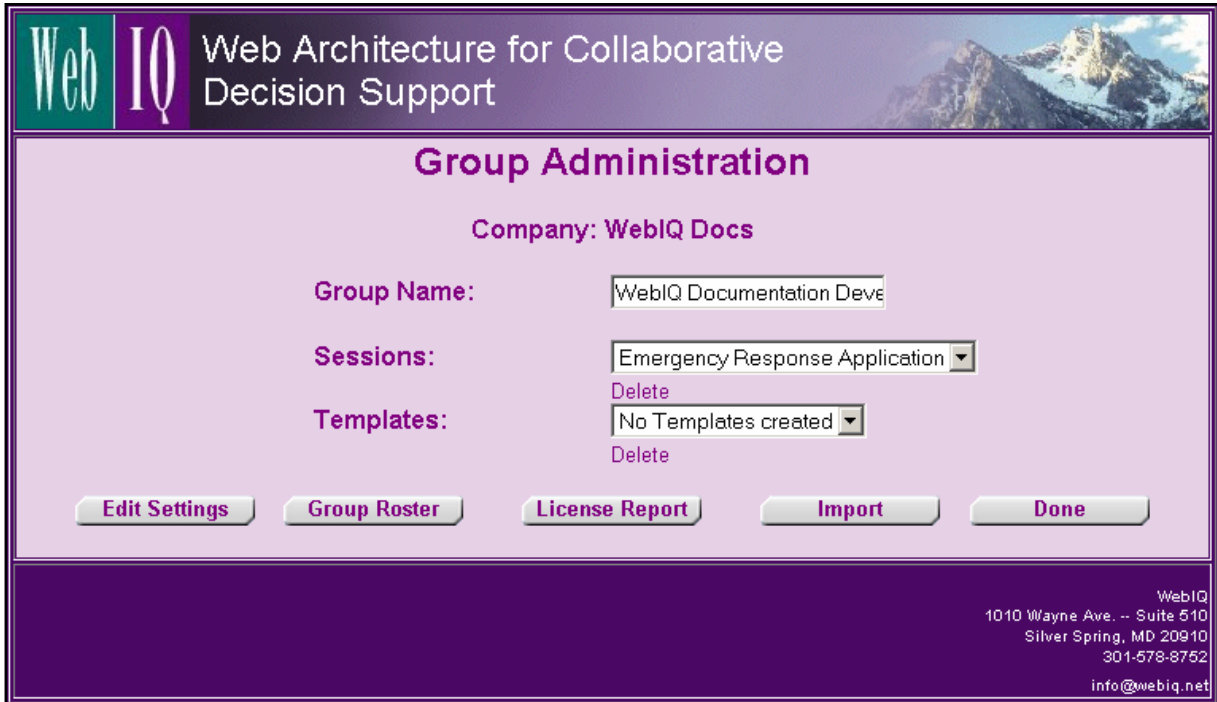
1. By clicking on the **Edit Settings** button, the Session Leader can limit session creation to Leaders only, choose not to send welcome emails, and prevent users from having access to archived sessions.
2. Group Leaders can disable their users' access to the **My Profile** option, thereby preventing users from modifying their accounts, by checking this option. This only applies to users who do not also appear in other groups. When a user appears in more than one group, the group with the most liberal policy towards the **My Profile** option will prevail.
3. Group Leaders can deny participants access to the archived sessions inside their groups. This option is very helpful when reusing generic and/or aliases with different participants in different sessions.
4. By clicking on the **Edit Welcome** button, the Group Leader can edit the welcome message sent to participants.



Please note that bold labels indicate the required fields.

Deleting a Group

1. From the Main Menu, click the **Group Administration** link.
2. Select the Group to delete from the **Existing Groups** scroll down menu.
3. Click the **Delete** button.
4. When the confirmation window appears, click **OK**, or click **Cancel** to abort.
5. Click **Done** to return to the Main Menu.



Group Administration Modify Screen

Editing Settings

1. From the **Group Administration Screen**, a Group Leader can edit the session **Settings**, view the **License Report**, edit the **Group Roster**, and **Import** other sessions and/or templates.



Edit Settings Screen

Adding/Modifying/Deleting a Participant


A Group Leader has control over the attributes of a Group, and when the **Limit Session Creation** option is set, the Group Leader is the only one able to create new Sessions within the Group. There can be more than one Group Leader in a Group. As Participant profiles are created, welcome messages are automatically emailed.

Adding a New Participant to a Group Roster

2. From the Main Menu, click the **Group Administration** link.
3. **Select** a Group from the drop-down menu.
4. Click the **Modify** button.
5. Click the **Group Roster** button.
6. Select **Create New User** from the username list box.
7. Complete the **User Profile** fields.
8. Select **Check Spelling** by checking the box. This will enable the spell checking function throughout the Session for a particular Participant.
9. Select **New Icons** by checking the box. This function allows Participants to see the “new” icon when new items have been added to Activities since they last entered that Activity.
10. Grant **Group Leader** status by checking the box. This allows a Participant the ability to modify and create additional Groups. Designated Group Leaders also have privileges over Sessions, Participants, and Templates inside the Group.
11. Select the **Language** of choice for the Participant. Each Participant then has the ability to select his/her individual language preference.
12. Click the **Submit** button to add the new Participant to the Group.
13. A pop-up will ask if you wish to **Create this User?**. Click **OK** or **Cancel** to abort.
14. After entering all new Participants, click the **Exit** button.

Modifying a Participant's Profile

1. From the Group Administration screen for a particular Group, click the **Modify** button.
2. Click the **Group Roster** button.
3. **Select** a Participant profile from the username list box.
4. Change any information in the Participant profile fields.
5. Click the **Submit** button to apply the changes.
6. A pop-up will ask if you wish to **Modify this User?**. Click **OK** or **Cancel** to abort.
7. Click the **Exit** button to return to the Group Administration screen.



WebIQ Documentation Development Group

Select "Create New User" or select a name to edit or delete: (Create New User) ▾

First Name:

Last Name:

Title:

Organization:

Miscellaneous:

Address:

City: State/Prov:

Zip/Postal: Country:

Work Phone:

Home Phone:

Email Address:

Please choose a unique User ID and a Password:

***User ID:**

***Password:**

***Password Again:**

* (This information is case sensitive.)

Check Spelling New Icons Group Leader

Language: English ▾

* Only Bolded Fields are Mandatory

Import Users
Send Email
Delete
Submit
Exit

Modify Group Roster Screen

Deleting a Participant's Profile

1. From the Group Administration screen for a particular Group, click the **Modify** button.
2. Click the **Group Roster** button.
3. Select a Participant profile from the username list box.
4. Click the **Delete** button.
5. To confirm the delete click **OK**, or **Cancel** to abort.
6. Click the **Exit** button to return to the Group Administration screen.



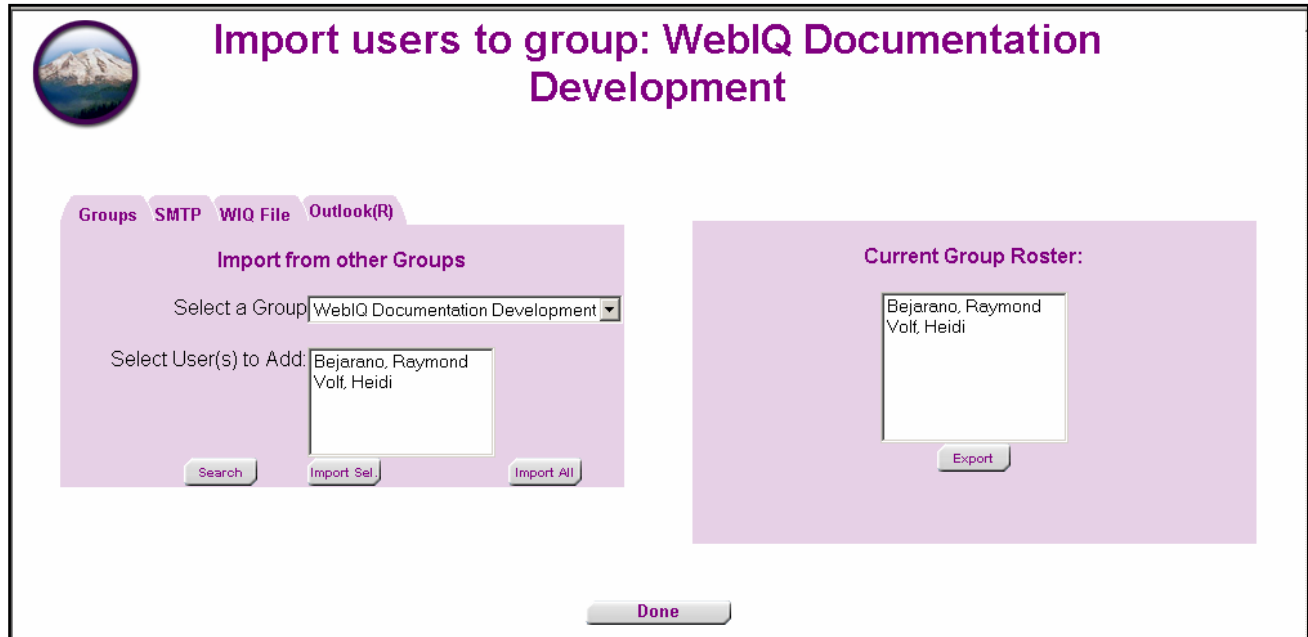
Caution should be used when deleting a Participant. If the Participant is not a member of any other Roster (i.e. this is the last entry for that Participant on any Group Roster), then all entries associated with that Participant will automatically have its source listed as "unknown author."

Importing Participants

Along with adding Participants one at a time to the Roster, the Group Leader also has the option to import selected Participants from other Group Rosters. Group rosters can be exported as WIQ files just like WebIQ sessions. These rosters can then be restored on a different server at a later time. This can all be done from the **Import Users** screen.

Importing Participants from Another Group

1. Go to the **Group Roster** screen for a particular Group.
2. Click the **Import Users** button.
3. Select the **Group** from which to import Participants.



Import Users Screen

4. **Highlight** the Participant to import by clicking his/her name. To multi-select entries, press and hold the **Ctrl** or **Shift** key while clicking.
5. Click the **Import Selected** or **Import All** button to import a single Participant or to import all the Participants from that Group. A pop-up screen will indicate the number of Participants imported.
6. A pop-up will ask **Add the selected users to your Group Roster?**. Click **OK** or **Cancel** to abort.
7. Click the **Done** button.



A **Search** button allows you to quickly find Participants, by name or email address, in other Groups to which you have access, to import them into the current Group.

Importing Participants from an SMTP Source

1. Go to the **Group Roster** screen for a particular Group.
2. Click the **Import Users** button.
3. From the **Import Users** screen, select the SMTP tab, and then type the SMTP list name from which to import Participants (see the network administrator for the list name).
4. Click the **Fetch List** link.
5. From the resulting list, select the Participants to import.
6. A pop-up will ask **Add the selected users to your Group Roster?**. Click **OK** or **Cancel** to abort.
7. Click the **Import Selected** button to import selected Participants, or the **Import All** button to import all Participants from the list. A pop-up screen will indicate the number of Participants imported.
8. Click the **Done** button.



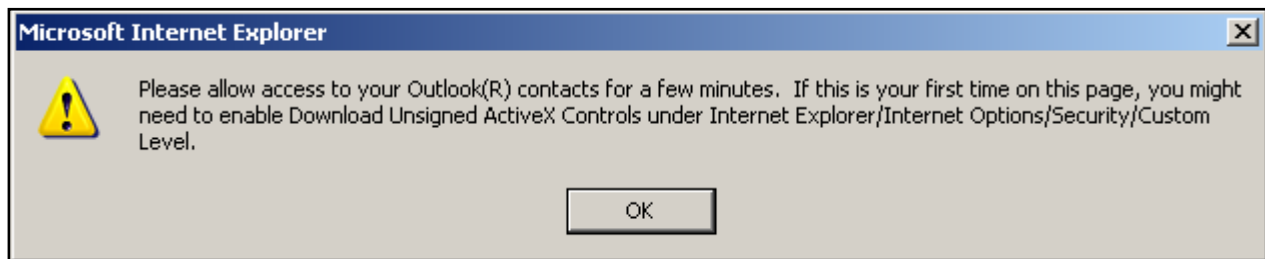
To multi-select entries in the SMTP list while using a PC, press and hold the **Ctrl** key while clicking. A Group of contiguous entries can also be selected by clicking on an entry and then holding down the **Shift** key while clicking on another. This will select all entries between the two. Similar functionality exists on a Macintosh using the **Apple** key and **Shift** keys respectively.

Importing Participants from a WIQ File

1. Go to the **Group Roster** screen for a particular Group.
2. Click the **Import Users** button.
3. From the **Import Users** screen, select the WIQ File tab.
4. Browse for and select the needed file.
5. Click the **Import** button.
6. Click the **Done** button.

Importing Participants from MS Outlook®

1. Go to the **Group Roster** screen for a particular Group.
2. Click the **Import Users** button.
3. From the **Import Users** screen, select the Outlook® tab. If you are running any kind of virus protection software, a message will pop-up that a script is trying to run an application. Click **OK**.



WebIQ Pop-up Screen



Microsoft Outlook ® Pop-up Screen

4. Another pop-up box will appear, asking if you wish to allow a program access to your MS Outlook® contact list. It will also ask for how many minutes it should allow the program access to your contact list. Click in the **Allow access for** box. Generally, a 5-minute setting is recommended. Names then are downloaded from your contact list and can be selected for the Group Roster.

5. Click the **Bring Select** link to import selected users, or the **Bring All** link to import all users from the list. A pop-up screen will indicate the number of users that were imported.
6. Click **OK**, or **Cancel** to abort.
7. Click the **Done** button.



*If using MS Outlook®, please configure your browser before logging into WebIQ. To interface with MS Outlook®, ActiveX controls must be enabled. These can be found in the Participant's internet security settings. If using MS Explorer®, Participants can click on the **Tool** option on the menu bar, select **Internet options**, click on the **Security** tab, and click on the **Custom Level** button.*

Session Setup

Overview

A Session is a decision-making process that contains an Agenda comprised of Topics and Activities. Sessions also have a Roster of Participants made up from one or more Groups. A Session Leader might choose to create a Session where Participants can brainstorm on the merits of submitted items and then vote on those items or rank them. A typical example might be a Session in a Marketing Group that addresses the question, “How can we increase market share?” with the resulting items rated on a scale by the Participants. Session Leaders (or the entire set of Activity Participants) can then review the results.

In addition to an Agenda, each Session has several attributes that can be configured to control access and define functionality. They include a Session name, a stated purpose, a definition of who can participate, and the timeframe during which the Session is active. (Participation may include a Roster of Participants or an entire Group’s membership.) Finally, Sessions can be configured to send out periodic reminders to all Participants or Non-Participants (those users who have not submitted responses).

Creating Sessions

A Session Leader (or any Participant from the Group Roster, if the Group was set up without checking the **Limit Session Creation** box) can create a new Session within a Group. Once a Session is created, the Session Leader can reassign the ownership of the Session to another person. Not only can a Session be created from scratch, but also a previous Session, saved with its Agenda intact but not containing results, ideas or comments, may be used as a Template to quickly set up the structure of a new Session. This template will retain the color scheme and language from when it was used in a previous Session.

Since each Session is identified by its name, the name entered should be as descriptive as possible to accurately reflect the purpose of the Session. A Session Leader can also upload a client or organization’s logo by clicking on the Logo button on the Session Settings screen. The Session Leader can then browse for and select the appropriate image file.



When creating or modifying a Session, the Session Leader can define other Session Leaders. A Session Leader has control over all the Session attributes. He or she can delete a Session, view the results of submissions, create and delete Agenda items, control who the Participants are, when the Session starts and ends, and even designate himself/herself as a Non-Participant for the purposes of reporting. The individual who creates the Session is automatically the Session Leader unless otherwise specified.

Create a Session Screen

Defining the General Properties

1. Click the **Create a Session** link on the Main Menu to view the Create a Session or Session Settings screen.
2. Optionally select a Session **Template** from the scroll down menu.



When creating a Session using a Template, the Session name will default to that of the Session from which the Template was created. The Session will also default to the start and end dates of the original Session. Be sure to rename the Session in the Session name field, and reset the start and end dates. If no Templates have been created for this Group, the Template field will read, **Do not use a template**.

3. Type the Session **Name**.
4. Provide a **Description** of the purpose of the Session by typing in the text area.
5. From the scroll down menu, select the particular **Group** for which the Session is to be defined.
6. Select the **Language** of choice for the Session (each Participant has the ability, if allowed, to set his/her language preferences).
7. Select the **Skin** or color scheme for the Session.

8. **Schedule** the start and end dates and times by using the scroll down boxes.

Sending Reminders

Reminders are email messages sent to Participants. A Session Leader may select **Don't send emails**, which is the default, **Reminders to everyone**, which sends a reminder to every Participant, or **Reminders to Non-Participants**. **Email-Based Participation OK**, if available, may also be selected to allow Participants to contribute via email. See the section on Email-Based Participation for more information on this feature. For **Open to the Public** Sessions, Participants are defined as those who have contributed to the Session.

1. Select an option from the **Reminders/Emails** list box.
2. Set the reminder **Interval**, if needed, from these options: **Daily**, **Weekly**, **Bi-weekly**, **Hourly**, **Every 2 Hours**, **Every 4 Hours**, **Every 6 Hours**, or **Twice Daily**.



Daily reminders are sent every 24 hours at the specific time the Session was created. Bi-weekly reminders are sent every 3.5 days from the specific time and date the Session was created. Weekly reminders are sent 7 days from the time and date the Session was created.

Anonymous Sessions

Selecting this checkbox enforces anonymity throughout a Session. This enables anonymity for any and all Activities created in the Session. The option for anonymity is disabled in all Activity setup screens. Once the Session Leader enables this option, an **Are You Sure** prompt appears. If the Session Leader clicks **OK**, *it cannot be undone*. The Participants Online box is replaced with the text “Anonymity Enforced,” and no Participant names are displayed.

Instant Messaging

A Participant has the ability to send an Instant Message to another Participant, when both Participants are logged in and participating in a Session at the same time. From the **Agenda** screen, he/she can click on a Participant's name from the Participants Online list, available by clicking the **Online** button in the upper right corner, type the message and click **OK**. To disable this feature, the Session Leader can check the **Disable Instant Messaging** box.

Session Lock-step

Selecting this checkbox gives the Session Leader the ability to control the browsers of all Participants, helping them navigate through the Session.

1. If selected, a prompt will appear in the upper right-hand portion of the Agenda/Activity screens.
2. Enter an Activity and click the **Join Me** button.
3. A confirmation dialog box appears.

Scheduling

Start Date: Mar 30 2005 Start Time: 09 : 35 PM
 End Date: Apr 30 2005 End Time: 09 : 35 PM
 CST America/Chicago

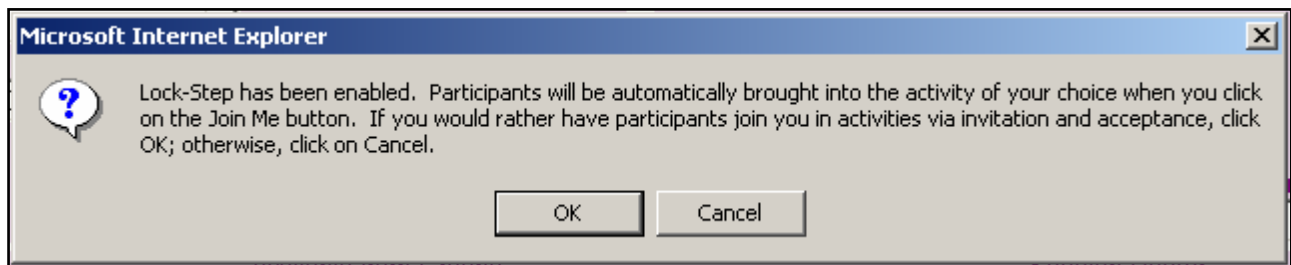
Reminders/Emails: Don't send emails Interval: N/A

Session Options:

Anonymous Session Add/Delete Logo
 Lock-Step Session Agenda Numbering:
 Disable Instant Messaging No Numbering

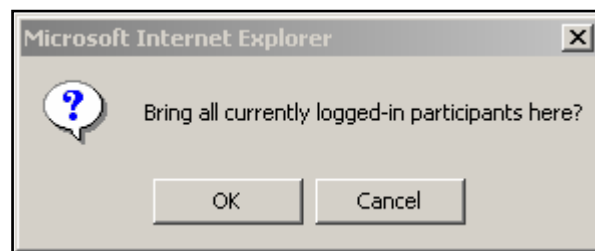
Lock-step Option on the Create a Session Screen

1. By clicking **OK**, all Participants will receive a prompt stating, *Your presence has been requested by the Session Leader*. The Participant can then click **OK** and be redirected to the particular screen to join the Session Leader.



Lock-step Enabled Prompt

2. By clicking **Cancel**, the participant will automatically be taken to the activity. This is the default.
3. The Session Leader receives a prompt box indicating the number of Participants that were redirected. This can be verified by clicking the **Online** button and viewing the Participants Online area in the upper right corner.
4. The Session Leader can check his/her **Online** list to see in which Activity a Participant is currently located. An asterisk (*) will appear next to the names of participants who are currently in the **Activity Result** screens.



Lock-step Prompt

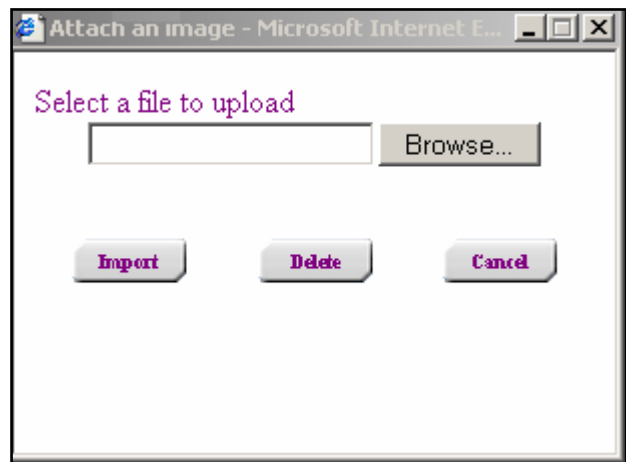
5. If a Participant is disconnected, the system will automatically take him/her back into the correct Activity when he/she logs back in.



The Participant screens have all the menu bar items removed except for the Session menu item containing the option to Change Sessions or Logoff. Once a Participant is redirected by the Session Leader, he/she may not leave that screen until the Session Leader redirects him/her to another screen. At all times, the only option the Participant has is to participate in the Activity or Logoff.

Add/Delete Logo (Circular Motif Replacement)

A Session Leader can also upload a client or organization's logo by clicking on the Logo button on the Session Settings screen. The following pop-up will then appear. The Session Leader can then browse for and select the appropriate image file. The current circular motif is 87 by 87 pixels and the replacement graphic should be of a similar size. A much larger graphic might slow the downloading of pages, and could be distorted.



Logo Replacement Pop-Up

Agenda Numbering

The Session Settings screen provides options for using different numbering schemes in Agendas. The numbering schemes can apply to both Topics and Activities, similar to the way Categories and Ideas are numbered in the Activities.

Defining the Participants

1. Click **Open to the Public** to make the Session available to all Group members. (Note: If this option is selected when the Session is created, only the Questionnaire Tool will be presented for Activity inclusion in the Agenda.) The Session Leader has the option to disable the ability of Participants to create their own accounts when invited to **Open to the Public** Sessions. See page 50 for more information.
2. If **Participants Only** then:
 - Build the Session Roster by highlighting a name in the **Available from Groups** list and clicking the right arrow to add to the **Session Roster**.



*As an alternative, a name can be **double-clicked** in the Available from Groups list to add it to the Session Roster. Double-clicking a name in the Session Roster will remove it.*

- Repeat this process to add all Participants for the Session. Select multiple Participants by pressing the **Ctrl** or **Shift** key and click to highlight multiple names.
- Search for Participants by clicking the **Search** button, and search by First Name, Last Name, or Email Address.
- Check the **Show all your groups** box to view the Participants from all the Groups.

Activate the Session

After making all the selections, click **Create** to activate, or **Cancel** to abort.

Deleting Sessions

Deleting a Session

1. Click the **Join a Session** or **Archived Sessions** link from the Main Menu.
2. **Select** the Session to delete by clicking on the Session name from the Available Sessions.
3. From the resulting Agenda screen, select **Session** from the menu bar and click **Settings**.
4. Click the **Delete** button.
5. Confirm the deletion by clicking **OK**, or **Cancel** to abort.



A Group Leader can also delete a Session from the Group Administration screen.

Modifying Sessions

Modifying a Session

1. Click the **Join a Session** or **Archived Sessions** link from the Main Menu.
2. **Select** the Session to modify by clicking the Session name from the Available Sessions.
3. From the resulting Agenda screen, select **Session** from the menu bar and click **Settings**.
4. **Modify** the Session properties as necessary. (Note: If the Session is changed to **Open to the Public**, an Activity compatibility check will be done. All non-Questionnaire Activities will be removed.)
5. A Session Leader can reassign the ownership of a Session to another person. When on the Session Settings screen, select the new Session Leader from the Session Roster. Click the checkbox next to **Session Leader**. Then, select your own name from the Session Roster, and uncheck the checkbox for **Session Leader**.
6. When finished, click:

- The **Send Invitations** box to save the changes and send email invitations to any new Participants.
- The **Submit** button to save changes, or **Cancel** to abort.



Please note that invitations are typically sent after a Session has been defined and the Agenda has been created (see Session Management).

Saving Sessions as Templates

After creating a Session and building its Agenda with Topics and Activities, a Session Leader may wish to save the structure of the Session for later use as a Template. These Templates can then be used to quickly build a new Session based on an existing one.



Please note that when saving a Session as a Template, no ideas or comments are saved in the Activities.

Saving a Session as a Template

1. Click the **Join a Session** or **Archived Sessions** link from the Main Menu.
2. Select the Session from which to create a Template by clicking on its link from the **Join a Session** screen.
3. From the resulting Agenda screen, select **Session** from the menu bar and click **Settings**.
4. Check the **Save Session as Template** box and click **Submit**.
5. In the prompt screen, type the name of the Template to be created.
6. Click **OK**, or **Cancel** to abort.

Exporting and Importing an Agenda

WebIQ can **Export** or **Import** an Agenda, so Sessions can be saved and transported from one server to another.

An Agenda **Export** can be done in two ways: **Save** and **Save Structure**. The **Save** option will save the Activities, Activity settings, Transfers, Topics, categories, alternatives, and criteria in an Activity. Additionally, all data contained in the Activities is retained. **Save Structure** saves the Activities, Activity settings, Transfers, Topics, categories, alternatives, and criteria in an Activity, but not the data contained in those Activities.

When **Importing** a Session, settings are not saved. Since loading a Session from a file is done from the Agenda screen, the imported Session “inherits” the Session settings already in place.

To **Export** an Agenda:

1. From the Agenda Designer screen of the Agenda to **Export**, select either **Save** or **Save Structure**.
2. Provide the file with the desired name and click **Save**.

To **Import** an Agenda:

1. Create a blank Agenda.
2. Select **Load** from the Agenda pull down menu.
3. Select the saved WebIQ Agenda, which should be a .wiq file.
4. Select **Import**.

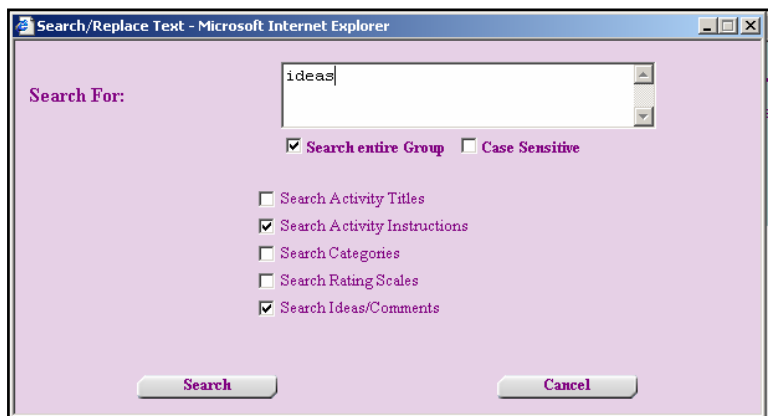
Archiving a Session

An **Archived Session** is one that is available in read-only mode. Archiving a Session also frees “participation-based” licenses. Sessions can be temporarily archived for the sake of freeing licenses, and then unarchived at a later time. In an archived Session, the Agenda looks normal, but the Activities are no longer available for participation. A Session must be closed before being archived. If the Session is not closed, an error message will be generated. (A Session is automatically closed by the system when its end date and time have passed.) Any Session with an end date more than 60 days prior, will be automatically archived, appearing on the Main Menu screen under the **Archived Sessions** menu item. If the Session Leader allows, Participants can access Closure Reports and Attachments from within the Session, even though the Session is archived.

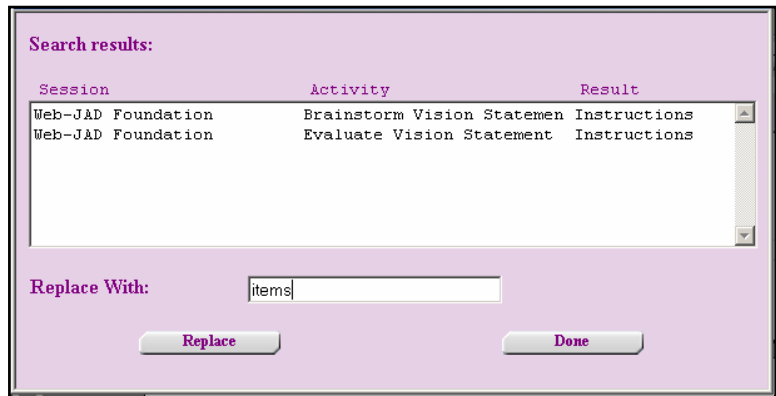
1. From the Session Settings screen, select the **Archived** checkbox and click **Submit**.
2. Now, after logging in, you will be presented with the option of viewing an **Archived Session** from the Main Menu.

Search and Replace

A **Search/Replace** option allows a Session Leader to search and replace information regarding activity, rating scales, titles, instructions, ideas, etc. From the Agenda screen, select **Session** from the menu bar and click **Search/Replace**. The **Search For** screen will appear. Enter the term to be searched for, and click on any options. After clicking on **Search**, a **Search Results** screen will appear containing a **Replace With** option. Enter text in the window to replace text in session, and click on the **Replace** button.



Search Screen



Replace Screen

The Search/Replace option has a secondary purpose, it allows session leaders to readily identify the name of a session and within that session, the name of the activity(s) where a specific text string occurs.

Session Management

Overview

The Agenda is a set of Topics and Activities within a Session that embodies the particular decision-making process. Topics are a convenient way to organize Activities under a single heading. An example of a Topic could be “Strategic Goals.” Activities are the tools the Session Participants must use to brainstorm ideas, vote on a set of items, assign ideas to categories, etc. An example of an Activity could be electronic brainstorming to gather suggestions for strategic goals using the Ideas Activity.

Items generated in the varying Activities can be transferred to other Activities. This allows Session Participants to generate ideas, vote on them, rank them, or process them using any of the other evaluation tools.

Finally, invitations to begin a Session can be sent to Participants once the Agenda has been created. These invitations can be sent to all Participants or only to newly added Participants.

Agenda Designer and Agenda

An Agenda has two views: **Agenda Designer** and **Agenda**. Agenda Designer view is for management purposes, such as adding or modifying Topics and Activities. Agenda view is for Participants interacting with the individual Activities. All Agenda Designer screens contain unique meeting tool icons. These icons also appear on the Agenda screen.



It is important to note that once an Agenda has been created, a Session Leader can easily alternate between Agenda Designer and Agenda. On the Agenda Designer screen, each Activity has two links: a button, which will take the Session Leader into the Activity for participation, and a text link, which selects the Activity (by highlighting it in red) for editing, deleting, transferring, or copying.

Agenda Menu Bar

The Agenda Menu Bar contains a variety of options, which, in turn contain several selections. From left to right are the **Session**, **Agenda**, **Participants**, **Message**, **Resources**, and **Help** options. Individual Menu Bar items contain their own specific functions as follows:

1. The **Session** drop-menu includes:
 - **Change:** Change Sessions,
 - **Logoff:** Logoff the Session,
 - **Settings:** Session settings, including agenda numbering choices,
 - **Search/Replace:** Search and Replace tools,
 - **Report:** Agenda, Participant, and Activity Reporter, and
 - **Mood Indicator:** View feedback commentary about the process of the Session itself.
2. The **Agenda** drop-menu includes:
 - **Agenda:** View seen by Participants,
 - **Load:** Upload a specific Session file,
 - **Save:** Save the structure AND data of a Session into an external file,
 - **Save Structure:** Save the structure of a Session into an external file, and
 - **Designer:** View seen by Session Leader, providing access to the tool set.
3. The **Participants** drop-menu includes:
 - **My Profile:** View and modify your profile as needed, and
 - **All Participants:** View the Session Roster.
4. The **Message** drop-menu includes:
 - **Email:** Send an email to a Participant and/or access your browser email client, and
 - **Chat:** Chat with Participants online.
5. The **Resources** drop-menu includes:
 - **Documents:** Attach files for access by all Participants, and
 - **Links:** Attach web links for access by all Participants.
6. The **Help** drop-menu includes:
 - **Get Started:** Online assistance,
 - **Leaders Guide:** An HTML version of the Session Leader's Guide, and
 - **About WebIQ:** The version being used and to whom the software is licensed.

An additional **Activity Menu** item is added to this Menu Bar when viewed from within an Activity. The functions provided are as follows:

1. **Edit:** Modify Activity settings,
2. **Import:** Import Activities,
3. **Notices:** Send Activity notice emails,
4. **Export:** Export Activity result data into a delimited file,
5. **Save:** Save everything including the data, and

6. **Save Structure:** Save only the structure of the Session for later use.

Agenda Designer Screen

Creating an Agenda – Topics and Activities

Creating Agenda Topics

1. After creating a Session, the Session Leader will automatically be directed to the Agenda Designer screen for that Session. The Session can also be accessed from the Main Menu by clicking the **Join a Session** link. From the resulting Agenda Screen, select **Agenda** from the menu bar and click **Designer**.
2. Click the **New Topic** link in the tool bar.
3. Type the Topic name in the resulting dialog box.
4. Click **OK** to create, or **Cancel** to abort.

Creating Agenda Activities

1. After creating a Session, the Session Leader will automatically be directed to the Agenda Designer screen for that Session. The Session can also be accessed from the Main Menu by clicking the **Join a**

Session link. From the resulting Agenda Screen, select **Agenda** from the menu bar and click **Designer**.

2. Click on the **Topic** to which you want to add Activities (it will highlight to red).
3. From the Meeting tool bar, click the type of **Activity** to add and complete the information necessary for setup (discussed in next section).
4. After creating the Activity, the Session Leader must make it available for participation. From the Agenda Designer screen, clicking the **green light/red light** will make an Activity available or unavailable to Participants. The availability of an Activity may also be managed from the Setup Activity screen.

General Procedures for Setting Up an Activity

The Activity Tools are of two types, Idea-type and Ballot-type. Amongst the Idea-type Activities are Ideas, Discussion, Organizer, and Questionnaire. The Ballot-type Activities include Categorize, Rate, Rank, Vote, Allocate, Select, and Score. The Presentation Tool is generally used as an introduction to the Session, while the Action Plan and Closure Tools conclude it.

The following procedures are the same for all Activities. Once these steps are completed, skip to the specific section for the Activity chosen for the additional steps required. The Agenda page automatically anchors to the Participant's cursor location, so that when he/she goes into an Activity, he/she will not have to scroll through the entire Agenda, to return to the same location.

When in an Activity, the Session Leader can select **Activity** from the menu bar at the top, making a drop-down menu appear. The menu has an **Edit** option for Activity settings, an **Import** option for importing Activities, a **Notices** option for sending Activity notice emails, an **Export** option for exporting Activity result data into a delimited file, a **Save** everything including data option, and a **Save Structure** option to save the Session as a Template for later use.

In most Activity settings screens, checkboxes labeled **Show Date/Time stamps** and **Show ID stamps** can be found. If **Show Date/Time stamps** is checked, the submission date and time of an item will be appear next to the submitted item on the Activity screen and any subsequent Report screens. If **Show ID stamps** is checked, a unique Participant identifier code will appear next to each item submitted on the Activity screen and any subsequent Report screens.

The Activity settings screens for ballot-type/prioritization Activities, such as **Rank**, **Rate**, and **Vote**, contain a **Clear Results** button at the bottom of the screen, for clearing out any previous results. This allows the Session or Activity Leader to reset all results to 0 and reuse the Activity as many times as necessary.

Title

- Type a **Title** for the new Activity.

Instructions

- Type the general **Instructions** (commentary text).

Session Agenda Participants Message Resources Help

Emergency Response Application

Description: To review the capabilities of WebIQ as they would apply in an emergency response situation involving a Hazardous Waste spill. **Online**

New Topic

Meeting Tools

- Presentation
- Ideas
- Collabwrite
- Tables
- Organizer
- Categorize
- Rate
- Rank
- Vote
- Select
- Allocate
- Score
- Action Plan
- Questionnaire
- Closure

Edit
Delete
Transfer
Copy
Reorder Selected

Setup Activity: Ideas

Title: Remedial Actions

Instructions: Please provide us with a list of possible remedial actions to address a Hazardous Waste spill. Click on

Availability: Available Unavailable

Participants:

Session Roster		Ideas Roster
Bejarano, Ray		Bejarano, Ray
Volf, Heidi	➔	Volf, Heidi (Lead)
	➜	

Do not count Session Leaders for participation. Activity Leader

Receive Transfer Updates: Yes No

Anonymous: Yes No

Show ID stamps:

Show Date/Time stamps:

Disable new entries:

Disable commenting:

Max. commenting depth: No limit

Ideas default collapsed:

Numbering: Simple Outline Legal None

Track Changes: Optional Always

Screen Refresh Code: No screen change
 Refresh to Bottom
 Refresh to Newest

Categories: **Categories:** No Categories **Modify Category List**
 [Add] [Delete]

Submit Send notices Import Ideas **Cancel**

Activity Set-up Screen

Availability

- Select whether the Activity will be **Available** for all Participants in general (check **Available**) or will be accessible only by Session Leaders (check **Unavailable**).



Please note that the Available/Unavailable option for each Activity can be used by the Session Leader to control which Activity the Participants can access. For example, a Session Leader might choose to make all Activities unavailable except for the currently active Ideas Activity. Once that Activity is complete, a Session Leader might make the Ideas Activity unavailable and the following Activity available, etc.

Participants

A Session Leader can create an Activity Roster from Participants listed in the Session Roster. By default, all Participants are listed in the Roster for the Activity.

1. To exclude a Participant, select his/her name from the Activity Roster scroll down menu.
2. Click the **right arrow** or **double-click** on the **highlighted** name to remove it from the Activity Roster. Click **Remove All** to remove all Participants from the Activity Roster. Select multiple Participants by pressing the **Ctrl** or **Shift** keys and clicking to highlight multiple names.
3. Participants not invited to participate in a particular Activity, will not see that Activity on their Agendas.

Activity Leaders

A Session Leader may designate any Participant as an Activity Leader. Activity Leaders have the same rights with respect to Activity content as Session Leaders. An Activity Leader is not allowed to change Activity or Session settings, however he/she can generate Reports on the Activities he/she leads. Once the Activity Leader selects the Reports desired, he/she has the same options available to the Session Leader, i.e. **Print, Email, Export**, etc.

Receiving Transfer Updates

- Select whether or not this Activity will be capable of receiving **Transfer Updates** after it has been participated in. The default is **No**.



*A Transfer of all items or all data will automatically copy new information after the original Transfer has occurred due to new submissions in the source Activity, unless the destination Activity has already been participated in. Answering **Yes** to Receive Transfer Updates will allow items to be copied over, even after the destination Activity has been participated in.*

Anonymous

- Select whether the Activity will be **Anonymous** (check **Yes**) or attributable to a Participant (**No** is the default). The Activity can be rendered attributable once again, prior to Participant use. (Not available in Presentation or Collabwrite activities.)

Send Notices

A Session Leader can send email notices to Participants inviting them to participate in the Activity.

1. Check **Send Notices** by clicking the box, then click **Submit**.
2. From the resulting **WebIQ Email** screen, modify the set of email recipients as required:
 - Select a Participant from the **Recipients** scroll down menu.
 - **Delete** Participants from the Roster by selecting their names from the **Recipients** scroll down menu and clicking **Delete**.
 - To modify email addresses, select a name from the **Session Roster**, edit the address in the **Edit** field, and click the **Edit** link.
3. To modify the default message, edit the **Subject** and **Body Text**.
4. Click the **Send IQ-Email** button.

5. Participants receive an email message containing an invitation to join the Activity, and a hyperlink to do so. The Participant need only click on the hyperlink to go directly to the WebIQ Activity.



A Session Leader may also send email by using his/her browser's email client (click the **Use Browser Email** radio button at the top of the screen). If the Session Leader chooses to use his/her browser's email client, then he/she is presented with a new message window from the default email client application on his/her computer, already populated with the Participants from the **WebIQ Mail** screen. With this message, a Session Leader can add, delete, or modify Participants as he/she normally would. He /she may also send the email as an attachment (click on **Attach**), or even communicate with MS Outlook® Calendar, creating a calendar entry for that Session.

Importing Ideas

When setting up an Activity, both the Session and Activity Leader can **Import** their ideas (Linefeed Delimited, or Tab Delimited) from another source document. (Not available in Presentation activity.)

1. Check the **Import Ideas** box and click **Submit**.
2. Use the **Copy** and **Paste** functions to copy and paste text into the text window.
3. When finished, click **Import Ideas**.



Note: The ability to drag and drop ideas, categories, and other items in several Activities allows activity data to be easily organized. The Session Leader is able to order ideas, categories, and comments by dragging and dropping them into the desired order. Dropping an item onto a peer item at the same level (such as comments of the same idea) will re-order the items with respect to each other. Dropping an item onto a “non-peer item” at a different level (such as a different idea, category, or a comment of a different parent) will automatically promote or demote the item as appropriate, effectively moving the item around.



Note: Categories and Ideas in a source Activity can be automatically demoted to Ideas and Comments in a destination Activity during a transfer. This is done by selecting “Categories & Ideas” as the Source Ideas type, and “Ideas” as the Destination Ideas type on the main Transfer screen. Similarly, Ideas and Comments can be promoted in a destination Activity. This is done by selecting “Ideas” as the Source Ideas type, and “Categories” as the Destination Ideas type, while selecting “Transfer Comments” on the Advanced Transfers tab.

Specific Procedures for All Activities

After completing the General Procedures for setting up an Activity, a Session or Activity Leader may choose additional options for specific Activities.

Presentation

The Presentation Tool is designed to present a file and/or web link to the Participants in a collaborative environment. This Activity can be synchronous or asynchronous. Its programming is similar to that of other Activities. It can contain an attachment, such as a text document, an MS PowerPoint® presentation, a spreadsheet, a URL, or an image, anything that the Session or Activity Leader would like to present to the

group. However, the Session or Activity Leader must ensure that all Participants within the Activity have the corresponding applications available on their computers.

The Presentation Tool can also be used simply as a placeholder on the Agenda, with nothing attached; for example, to indicate “Lunch” or “Break,” etc.

The screenshot shows the 'Setup Activity: Presentation' screen in the WebIQ interface. The main title is 'Emergency Response Application' with a description: 'To review the capabilities of WebIQ as they would apply in an emergency response situation involving a Hazardous Waste spill.' The 'Setup Activity: Presentation' form includes the following fields and options:

- Title:** Presentation
- Availability:** Available Unavailable
- Participants:** Session Roster (Stinson Masters, Kate; Bejarano, Ray; Volk, Heidi) and Presentation Roster (Bejarano, Ray; Stinson Masters, Kate; Volk, Heidi (Lead))
- Attachment:** Heidi Volk[1].doc (Change, Delete)
- Image/Picture:** NONE (Change, Delete)
- Appearance Options:** Pre-line spaces (0), Post-line spaces (0), Bold Title (checkbox), Title Size (Normal)

Buttons at the bottom include 'Submit', 'Send notices' (checkbox), and 'Cancel'. A sidebar on the left contains 'Meeting Tools' such as Presentation, Ideas, Collabwrite, Tables, Organizer, Categorize, Rate, Rank, Vote, Select, Allocate, Score, Action Plan, Questionnaire, and Closure.

Presentation Activity Screen

1. To attach a text document, an MS PowerPoint® presentation, a spreadsheet, or URL, type the path to your file in the **Attachment** box, or click the **Change** button. This will allow you to browse for your attachment. You can later **Change** the Attachment, or **Delete** it.
2. To attach an image or graphic file to be displayed on the Agenda as an icon on the Presentation Activity button, type the path to your file in the **Image** box, or click the **Change** button. This will allow you to browse for your graphic file. You can later **Change** the Image, or **Delete** it.
3. The **Appearance Options** have to do with using the Presentation Tool as a placeholder on the Agenda to announce such items as “Lunch” or “Break.” They allow you to set the number of **Pre-line spaces**, **Post-line spaces**, to select a **Bold Title**, and even **Title Size**.

Ideas

An Ideas Activity is generally used for gathering information or brainstorming, but categories can be created to address specific issues. Participants can submit input and

comments to previously submitted ideas. Ideas can be copied and dragged and dropped into categories. The Activity can also organize the ideas into categories after the Activity has been participated in.

1. Clicking in the **Show ID stamps** box, will allow you to identify which ideas were contributed by which Participants.
2. Clicking in the **Show Date/Time stamps** box, will allow you to know exactly when an idea was contributed.
3. **Disable new entries** will allow Participants to view ideas that have been gathered, but will not allow them to submit new ideas.
4. **Disable commenting** will remove the Participants' ability to comment on the ideas gathered.
5. **Maximum Depth** will set a limit on Participant commenting, thus limiting the growth of commenting trees.
6. Ideas may be presented in either collapsed or expanded form. If **Ideas default collapsed** is checked, ideas that have subordinate comments are shown with a **+** to the left of the idea number. The idea's comments may be shown by clicking on the **+**. If **Ideas default collapsed** is not checked, comments are shown under their ideas. A **-** appears to the left of the idea number. The idea's comments may be hidden by clicking on the **-**.
7. When selecting a method for numbering the list, choosing **Simple** will apply the 1, 2, 3 numbering style for all levels of ideas and comments. The **Outline** style uses a Roman numeral for each idea, a capitalized letter for each comment, and an Arabic numeral for comments to comments. The **Legal** style applies the numbering scheme common in legal documents (i.e. 1.2, 1.2.1, 1.2.1.a).
8. Enable the tracking of changes by selecting **Optional** or **Always**. This feature displays edited text with the edits remaining visible. If an idea is deleted, the deletion is displayed as strikethrough text. If an idea is edited, additions to the original text are in green.
9. The Ideas Activity screen is subject to a periodic refresh cycle. This setting determines the view after a Refresh. The first option, **No screen change**, allows the first idea on the screen to remain visible. With the second option, **Refresh to Bottom**, the view may be changed so that the last idea submitted is always visible. With the third option, **Refresh to Newest**, the view may be changed so that it includes the last idea that was submitted.
10. Click **Submit** to create the Activity, or **Cancel** to abort.

Collabwrite

This is WebIQ's activity for composing, modifying, and updating Microsoft Word-like formatted documents. The Activity presents a full-page editor, into which Microsoft Word documents can be directly pasted.

1. **Track Changes** is the default setting for this activity. It will maintain a change log for every revision of a document submitted to it. Clicking in the **Read-only for participants** box will render the activity "read-only" to participants. That is, participants will be able to view the activity, but not alter or contribute to it.
2. Click **Submit** to create the Activity, or **Cancel** to abort.

The Collabwrite **Results** screen includes a **Changes Report**, from which each revision can be selected for viewing, with the changes on each revision highlighted. All wording and paragraph changes, deletions, and insertions are highlighted. Changes to formatting or simple punctuation changes are not highlighted.

The Editor has numerous formatting features, such as **Bold, Italics, Fonts, Font Styles, Alignment, Auto-Numbering, Auto-Bulleting, Indenting, Color, Hyperlinks, Tables, and Images**. Most of these features are available from a toolbar immediately above the editor screen. Images, before being pasted into documents, must first be uploaded to WebIQ using an **Image Library** feature at the bottom of the screen. Images uploaded to the library can then be inserted into the document using the **Image** button in to editor toolbar.

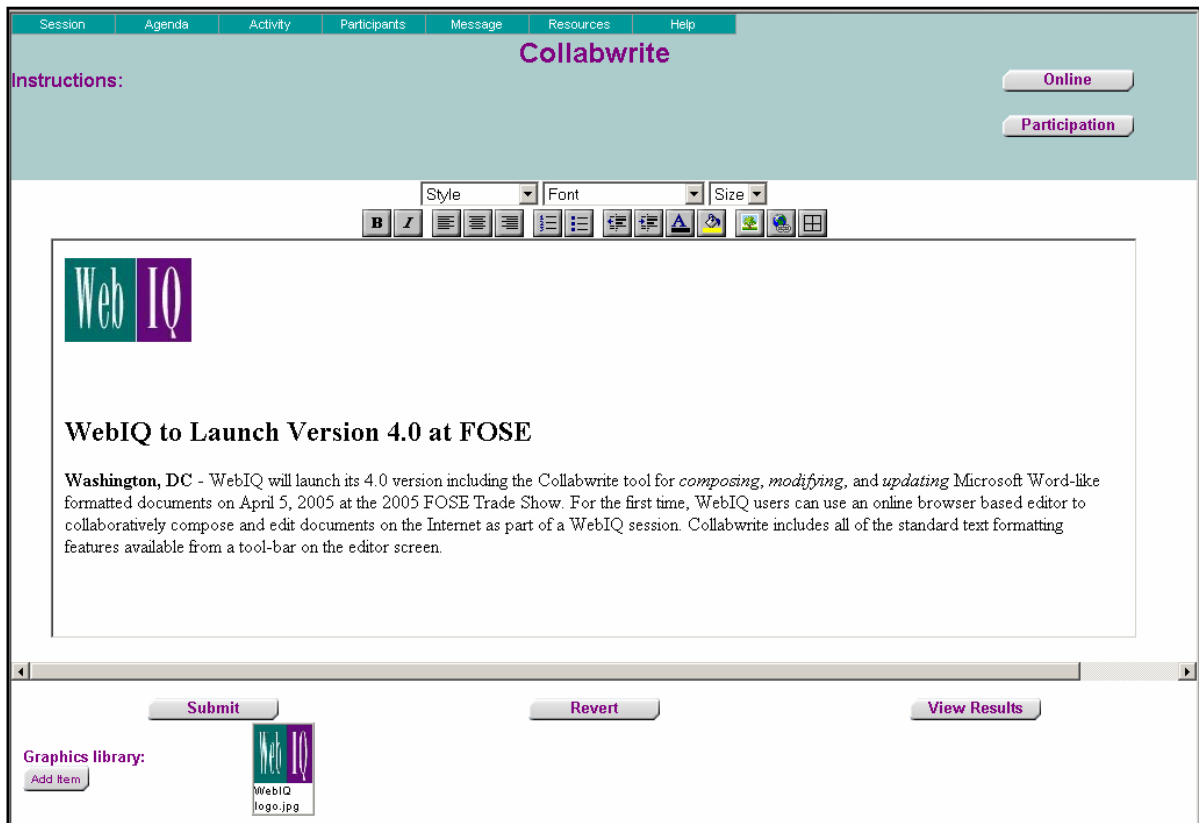


Note: Collabwrite is a “first-submit wins” activity. If multiple participants are in the same Collabwrite activity, the first one to submit their changes will automatically update the screens of all other participants, potentially causing them to lose their changes. For this reason, we recommend splitting your documents into several Collabwrite activities and then recombining the document with the Transfer feature after changes have been completed.

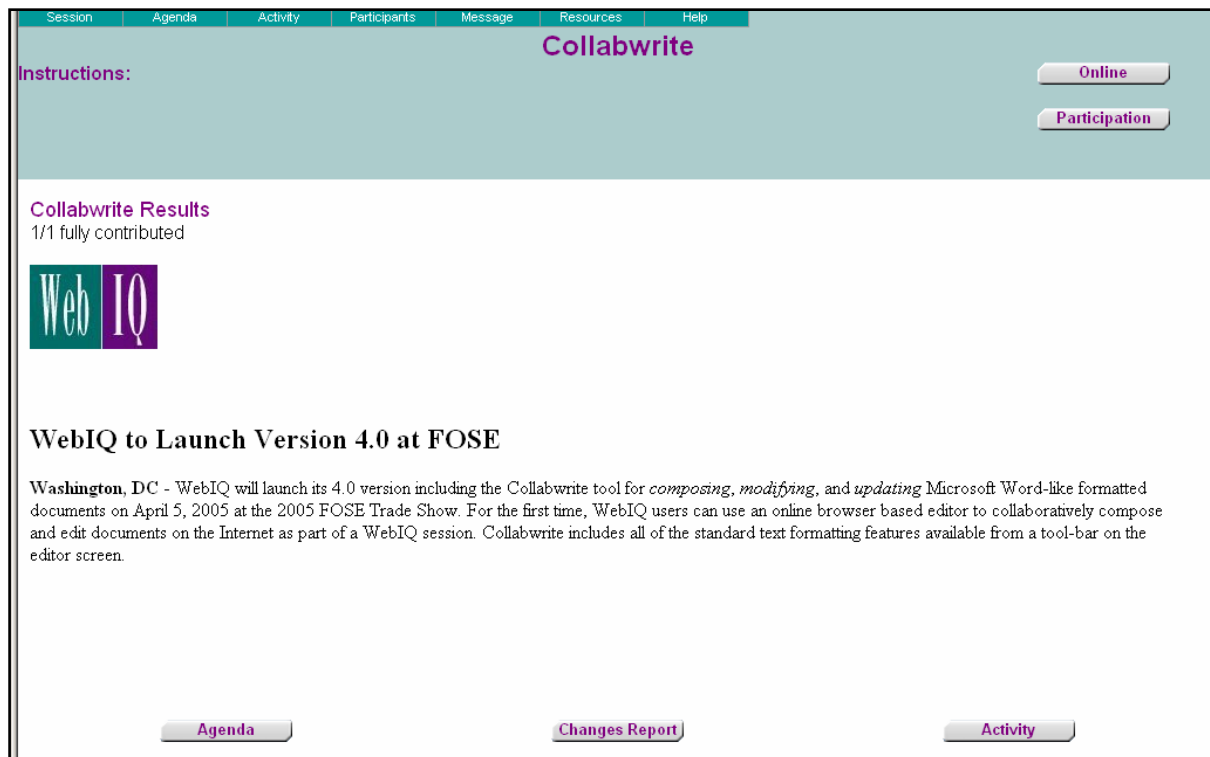


Note: The Collabwrite editor unfortunately is only available for users of Microsoft Windows Internet Explorer 5.5 or better. All others will be shown a simple text-area box with raw HTML tags. Changes can be made in this box as normal, provided the user understands HTML.

Collabwrite Activity Set-Up Screen



Collabwrite Activity Editor Screen



Collabwrite Activity Results Screen

Tables

Tables is an activity for brainstorming or otherwise entering data into a structured table format. The activity requires non-empty column headings for all columns in the activity, which will correspond directly to Categories in other activities. Below the column headings are any number of rows for entering text, numeric, or simple formulaic data.

The screenshot shows the 'Setup Activity: Tables' interface. At the top, there are tabs for 'Session', 'Agenda', 'Participants', and 'Help'. Below these is the title 'Emergency Response Application' and a description: 'To review the capabilities of WebIQ as they would apply in an emergency response situation involving a Hazardous Waste spill'. There are 'Online' and 'Join Me' buttons. The left sidebar lists 'Meeting Tools' such as Presentation, Ideas, Collabwrite, Tables, Organizer, Categorize, Rate, Rank, Vote, Select, Allocate, Score, Action Plan, Questionnaire, and Closure. The main area is titled 'Setup Activity: Tables' and contains the following fields and options:

- Title:** Untitled: Tables
- Instructions:** (empty text area)
- Availability:** Available Unavailable
- Participants:** Session Roster (Volf, Heidi; Bejarano, Raymond) and Tables Roster (Bejarano, Raymond (Lead); Volf, Heidi (Lead))
- Receive Transfer Updates:** Do not count Session Leaders for participation. Activity Leader
- Anonymous:** Yes No
- Disable new entries:** Yes No
- Column Headings:** No columns
- Modify column list:** Title: (empty), [Add] [Delete]

At the bottom, there are buttons for 'Submit', 'Send notices', 'Import Ideas', and 'Cancel'.

Tables Activity Set-Up Screen

The Tables activity is a true collaborative activity. Each cell in a table is modified by clicking on the cell with the mouse, which will cause an editor box to appear at the bottom of the screen. The text, numeric data, or formula can be entered or pasted in this box and submitted. Changes will be made immediately available to all participants.

1. Clicking in the **Anonymous** option will allow participants to remain anonymous when data is transferred to an activity that displays attribution.
2. **Disable new entries** will allow Participants to view items that have been submitted, but will not allow them to submit new items.
3. **Column Headings** will allow for each column to be named. Should this option not be selected, the program will automatically use the top row as the column headings.
4. **Number of Rows** will allow for the number of rows to appear in the table to be selected.
5. Click **Submit** to create the Activity, or **Cancel** to abort.

Session Agenda Activity Participants Message Resources Help

Tables

Instructions: Online
Participation

Tables Results

1/1 fully contributed

	A	B	C
1	Technology	Capabilities	Examples
2	Meeting Systems/GDSS	Real-time structured brainstorming and idea evaluation	WebIQ
3	Conferencing	Real-time communications via white boarding, presentations and shared apps	WebEx, NetMeeting
4	Knowledge Base	Knowledge sharing, document storage, categorization, search and retrieval	Intraspect's Knowledge Server, ObjectSpace's Voyager Application Server
5	Survey	Fixed structure opinion gathering in non-real-time	Zoomerang, The Survey System, Net Reflector
6	Groupware	Document sharing, workflow and threaded discussions	Lotus Notes, MS Exchange, Novell Groupwise, Instinctive, eRoom
7	Chat	Real-time, topic-based electronic communications	AOL, ICQ, MSN
8	E-mail	One-to-many, non-real-time electronic communications	Outlook, Lotus Notes

Agenda
Activity

Tables Activity Results Screen

The Tables activity can accept tables pasted from Microsoft Excel through the **Import Ideas** feature available to Session and Activity Leaders on either the Activity menu, or the Tables Tool Activity Settings screen.

The Tables activity will accept simple mathematical formulas when the user begins their cell data with an equal sign (=). This can be followed by real or integer values, mathematical operators like +, -, /, and *, parentheses for organizing operations, as well as cell names (A4). Addition of a range of cells can be called for as well using the “..” operator, as in A2..A7. The formulas will always be shown as entered on the Tables Tool Activity screen. The results of calculations are only shown on the **Tables Tool Results** screen. Here are some sample formulas that can be entered into cells:

$$=1+(7/2)$$

$$=A3+A7*6$$

$$=A2..A7$$

The normal order of operations is not respected in the Tables Tool. Operations are always evaluated from left to right. Please use the parentheses to override this rule.

Organizer

The Organizer activity is a WebIQ idea-gathering Activity that enables Participants to add ideas and categories by splitting the screen vertically into two frames: one for ideas and the other for categories. Participants can enter ideas or categories and assign their own ideas to a category. Session or Activity Leaders can rearrange ideas into different categories. Categories can be edited and rearranged by simply clicking on and dragging the idea or comment to the intended category box.

1. Clicking in the **Show ID stamps** box, will allow you to identify which ideas were contributed by which Participants.
2. Clicking in the **Show Date/Time stamps** box, will allow you to know exactly when an idea was contributed.
3. **Disable new entries** will allow Participants to view ideas that have been gathered, but will not allow them to submit new ideas.
4. **Disable commenting** will remove the Participants' ability to comment on the ideas gathered.
5. Ideas may be presented in either collapsed or expanded form. If **Ideas default collapsed** is checked, ideas that have subordinate comments are shown with a **+** to the left of the idea number. The idea's comments may be shown by clicking on the **+**. If **Ideas default collapsed** is not checked, comments are shown under their ideas. A **-** appears to the left of the idea number. The idea's comments may be hidden by clicking on the **-**.
6. Category creation may be restricted to Session or Activity Leaders by selecting the **Authoring** (Allow only Leaders to create categories) checkbox.
7. When selecting a method for numbering the list, choosing **Simple** will apply the 1, 2, 3 numbering style for all levels of ideas and comments. The **Outline** style uses a Roman numeral for each idea, a capitalized letter for each comment, and an Arabic numeral for comments to comments. The **Legal** style applies the numbering scheme common in legal documents (i.e. 1.2, 1.2.1, 1.2.1.a).
8. Enable the tracking of changes by selecting **Optional** or **Always**. This feature displays edited text with the edits remaining visible. If an idea is deleted, the deletion is displayed as strikethrough text. If an idea is edited, additions to the original text are in green.
9. The Organizer Activity screen is subject to a periodic refresh cycle. This setting determines the view after a Refresh. The first option, **No screen change**, allows the first idea on the screen to remain visible. With the second option, **Refresh to Bottom**, the view may be changed so that the last idea submitted is always visible. With the third option, **Refresh to Newest**, the view may be changed so that it includes the last idea that was added.
10. Add/Delete/Modify categories by typing in the **Modify Category List** window and clicking **Add** or **Delete**.
11. Click **Submit** to create the Activity, or **Cancel** to abort.

Specific Idea-Type Activity Functions

The preceding information-gathering Activities, also referred to as "Idea-type Tools," contain a variety of control or management functions, within each Activity, some of which are available to the Participants as well as the Session or Activity Leader.

The following control tools are available at the bottom of each Idea-type Tool Activity screen.

1. **Expand** provides for the list of ideas and comments to be displayed in its entirety in outline form, with ideas and then comments listed underneath.

2. **Merge** provides for the merging of two or more ideas into one. Selecting **Merge** will bring up a new screen asking which ideas to merge, with a text box into which to type in the replacement idea. The ideas being merged will still appear, but as comments, listed under the replacement idea.
3. **Deletions** provides the Session or Activity Leader with the ability to make multiple deletions of ideas and comments. Selecting **Deletions** will bring up a new screen where ideas and comments are listed with checkboxes. The Session or Activity Leader can then check any and all boxes corresponding to the idea/comments he/she wishes to delete.
4. **Collapse** provides for only the header ideas to be displayed, without the ideas/comments underneath.
5. **Add Idea** is available to Participants as well. It allows you to add ideas within an Activity. You can also simply use the **Enter** key. This feature is not available when categories are involved.
6. **Paragraph** opens a much larger textbox allowing the Session and Activity Leader or Participant the ability to view more than 2 lines of text at a time.

When clicking on any particular idea within an Activity, a new screen with a new series of buttons comes up. The following options become available:

1. **Edit** provides for the editing of an idea. A text box appears with the selected text inside. Make changes then click on **Submit Edit**.
2. **Delete** provides for the deletion of an idea. Click the **Delete** button, and a pop-up asks if you are sure you wish to delete this particular item. Click **OK**.
3. **Attach** provides the Session and Activity Leaders or Participants the ability to enter a file description and upload a file to attach to the idea or comments. After clicking on the button, two text boxes come up, one for a file description, one for the file itself. The file can be accessed from the Participant's computer with the **Browse** button. To complete the upload, click **Add Attachment**.
4. **Comment** provides Participants with the ability to comment on specific ideas.
5. **Promote** provides for a particular idea or comment to be upgraded to a higher level of importance.
6. **Demote** provides for a particular idea or comment to be downgraded to a lower level of importance.
7. **Copy** allows for the copying of an idea or comment. When this button is clicked, a pop-up will ask you to click **OK** to copy the item.

Categorize

With the Categorize activity, Participants group input into categories. The items within the Categorize Activity are the result of a Transfer from another Activity (i.e. Ideas), but can also be the result of a Transfer from an Activity in another Session. A Session or Activity Leader can also specify the categories in advance. This Activity generates a Report showing the number of times each item is assigned to each category. This Activity now supports three views: **Normal**, **Table**, and **Drop-Down**.

1. Clicking in the **Show ID stamps** box, will allow you to identify which items to be rated or voted on were contributed by which Participants.
2. Clicking in the **Show Date/Time stamps** box, will allow you to know exactly when an item was contributed.
3. **Disable commenting** will remove the Participants' ability to comment on the items gathered.
4. Items may be presented in either collapsed or expanded form. If **Ideas default collapsed** is checked, items that have subordinate comments are shown with a **+** to the left of the item number. The item's comments may be shown by clicking on the **+**. If **Ideas default collapsed** is not checked, comments are shown under their items. A **-** appears to the left of the item number. The item's comments may be hidden by clicking on the **-**.
5. To select the degree of abstention permitted by Participants, select from the available radio buttons: **Do not allow**, **Allow everyone**, or **Leaders only**. The Session or Activity Leader might check **Leaders only** if he/she wishes to respond to part of the ballot, but abstain from the rest.
6. The Categorize Activity supports three views: **Buttons**, **Table**, and **Drop-Down**. The default **Buttons** view allows the Participant to see the question, and then check a box next to the corresponding choice. In the **Table** view, the Participant is presented with column names corresponding with the offered categories and row names corresponding to the items to be categorized. The **Drop-Down** view shows the question and then a box to the right where the Participant can highlight the selected answer.
7. To **Allow assignment to multiple categories**, check the box.
8. Add/Delete/Modify categories by typing in the **Modify Category List** box and clicking **Add** or **Delete**.
9. Click the box next to the following to set viewing **Options**:
 - Allow previewing of Group results before and after Participant contribution.
 - Allow viewing of Group results only after the Participant has contributed.
 - Do not allow viewing of Group results.
 - Make this Activity non-collaborative and only the last Participant's input will be counted.
 - Make every Participant's input public.
 - Allow Participant to make changes after contribution.
10. Click **Submit** to create the Activity or **Cancel** to abort.

Rate

A Rate Activity allows Participants to assign strengths of belief or desire to individual items based on a scale selected by the Session or Activity Leader. This Activity generates multiple statistical Reports, including an indication of consensus or lack of consensus, and XY plotting capabilities.

1. Clicking in the **Show ID stamps** box, will allow you to identify which items to be rated or voted on were contributed by which Participants.
2. Clicking in the **Show Date/Time stamps** box, will allow you to know exactly when an item was contributed.
3. **Disable commenting** will remove the Participants' ability to comment on the items gathered.
4. Items may be presented in either collapsed or expanded form. If **Ideas default collapsed** is checked, items that have subordinate comments are shown with a **+** to the left of the item number. The item's comments may be shown by clicking on the **+**. If **Ideas default collapsed** is not checked, comments are shown under their item. A **-** appears to the left of the item number. The item's comments may be hidden by clicking on the **-**.
5. To select the degree of abstention permitted by Participants, select from the available radio buttons: **Do not allow**, **Allow everyone**, or **Leaders only**. The Session or Activity Leader might check **Leaders only** if he/she wishes to respond to part of the ballot, but abstain from the rest.
6. If the **Use the table format** checkbox is selected, the items appear as table row labels and the rating criteria appear as column headings. A pull-down list (with rating choices) appears as the content of cells corresponding to the intersection of each criterion and item.
7. In the **Rating Scale** section, select the **Rating Type** from the scroll down menu (Always...Never, Agree...Disagree, etc.).
8. Set the **Scale** for the rating from the scroll down menu (1-3, 1-5, etc.).
9. If desired, you may enter your own scale with up to 10 choices from lowest to highest, separating each item with a comma. You must select "Do not use any of these scales" in the **Rating Type** box to use your own scale.
10. To setup additional criteria, click the **Add Criteria** button. The screen will be redrawn giving the option to add criteria. Each criterion has its own rating scale and description.



*The Session or Activity Leader has the option of deleting or adding criteria. There is no limit to the number of criteria that can be added. The rating screen will roll horizontally if more criteria are on the screen than can be displayed. The results screens also reflect the multiple criteria selections. **XY Plot**: When using multi-criteria, the XY Plot graph gives users the option to choose which criteria to display on the X and Y axes.*

11. Click the box next to the following to set viewing **Options**:
 - Allow previewing of Group results before and after Participant contribution.
 - Allow viewing of Group results only after the Participant has contributed.
 - Do not allow viewing of Group results.
 - Make this Activity non-collaborative and only the last Participant's input will be counted.

- Make every Participant's input public.
 - Allow Participant to make changes after contribution.
12. Click **Submit** to create the Activity or **Cancel** to abort.

Rank

The Rank Activity is available so that each Participant can sort items into a descending order of preference. They can drag and drop items to move them into the desired place. For browsers not supporting drag and drop, the up/down arrows move the items (drag and drop is supported by MS Explorer® 5.0 and greater). This Activity generates a minimum/maximum/average Report for the items based on the submitted rankings.

1. Clicking in the **Show ID stamps** box, will allow you to identify which items to be rated or voted on were contributed by which Participants.
2. Clicking in the **Show Date/Time stamps** box, will allow you to know exactly when an item was contributed.
3. **Disable commenting** will remove the Participants' ability to comment on the items gathered.
4. Items may be presented in either collapsed or expanded form. If **Ideas default collapsed** is checked, items that have subordinate comments are shown with a **+** to the left of the item number. The item's comments may be shown by clicking on the **+**. If **Ideas default collapsed** is not checked, comments are shown under their item. A **-** appears to the left of the item number. The item's comments may be hidden by clicking on the **-**.
5. Click the box next to the following to set viewing **Options**:
 - Allow previewing of Group results before and after Participant contribution.
 - Allow viewing of Group results only after the Participant has contributed.
 - Do not allow viewing of Group results.
 - Make this Activity non-collaborative and only the last Participant's input will be counted.
 - Make every Participant's input public.
 - Allow Participant to make changes after contribution.
6. Click **Submit** to create the Activity or **Cancel** to abort.

Vote

Voting solicits a **Yes**, **No**, or **Abstain** response from the Participants. This Activity creates a Report showing the percentage breakdown of the votes for each item.

1. Clicking in the **Show ID stamps** box, will allow you to identify which items to be rated or voted on were contributed by which Participants.
2. Clicking in the **Show Date/Time stamps** box, will allow you to know exactly when an item was contributed.

3. **Disable commenting** will remove the Participants' ability to comment on the items gathered.
4. Items may be presented in either collapsed or expanded form. If **Ideas default collapsed** is checked, items that have subordinate comments are shown with a **+** to the left of the item number. The item's comments may be shown by clicking on the **+**. If **Ideas default collapsed** is not checked, comments are shown under their item. A **-** appears to the left of the item number. The item's comments may be hidden by clicking on the **-**.
5. To select the degree of abstention permitted by Participants, select from the available radio buttons: **Do not allow**, **Allow everyone**, or **Leaders only**. The Session or Activity Leader might check **Leaders only** if he/she wishes to respond to part of the ballot, but abstain from the rest.
6. Click the box next to the following to set viewing **Options**:
 - Allow previewing of Group results before and after Participant contribution.
 - Allow viewing of Group results only after the Participant has contributed.
 - Do not allow viewing of Group results.
 - Make this Activity non-collaborative and only the last Participant's input will be counted.
 - Make every Participant's input public.
 - Allow Participant to make changes after contribution.
7. Click **Submit** to create the Activity or **Cancel** to abort.

Select

The Select activity allows Participants to specify their preferences by choosing or selecting items with checkboxes. A Session or Activity Leader controls the number of items that must be selected through the Activity settings. This Activity creates a Report showing the number of times each item was selected and sorts those selections in descending order.

1. Clicking in the **Show ID stamps** box, will allow you to identify which items to be rated or voted on were contributed by which Participants.
2. Clicking in the **Show Date/Time stamps** box, will allow you to know exactly when an item was contributed.
3. **Disable commenting** will remove the Participants' ability to comment on the items gathered.
4. Items may be presented in either collapsed or expanded form. If **Ideas default collapsed** is checked, items that have subordinate comments are shown with a **+** to the left of the item number. The item's comments may be shown by clicking on the **+**. If **Ideas default collapsed** is not checked, comments are shown under their item. A **-** appears to the left of the item number. The item's comments may be hidden by clicking on the **-**.

5. The **Selection Default** checkbox enables the selection of all items when this Activity is presented.
6. Define the **Number to Select** by entering a range of numbers in the text boxes. Set both numbers to the same value if you do not want to allow for a range. Choose if the range is applicable **For all Ideas** or **Per Category**.
7. Click the box next to the following to set viewing **Options**:
 - Allow previewing of Group results before and after Participant contribution.
 - Allow viewing of Group results only after the Participant has contributed.
 - Do not allow viewing of Group results.
 - Make this Activity non-collaborative and only the last Participant's input will be counted.
 - Make every Participant's input public.
 - Allow Participant to make changes after contribution.
8. Click **Submit** to create the Activity or **Cancel** to abort.

Allocate

The Allocate Activity is a tool for resource allotment. Each Participant allocates units, such as dollars, to the items presented in the amount of his/her choice. This Activity creates a Report showing the average amount allocated to the items in descending order.

1. Clicking in the **Show ID stamps** box, will allow you to identify which items to be rated or voted on were contributed by which Participants.
2. Clicking in the **Show Date/Time stamps** box, will allow you to know exactly when an item was contributed.
3. **Disable commenting** will remove the Participants' ability to comment on the items gathered.
4. Items may be presented in either collapsed or expanded form. If **Ideas default collapsed** is checked, items that have subordinate comments are shown with a **+** to the left of the item number. The item's comments may be shown by clicking on the **+**. If **Ideas default collapsed** is not checked, comments are shown under their item. A **-** appears to the left of the item number. The item's comments may be hidden by clicking on the **-**.
5. Define the **Amount to Allocate** by entering a range of numbers in the text boxes. Set both numbers to the same value if you do not want to allow for a range. Choose if the range is applicable **For all Ideas, Per Idea** or **Per Category**.
6. Describe the **Units Label** (e.g. dollars, points, hours, etc.) by typing it in the text box.
7. Click the box next to the following to set viewing **Options**:
 - Allow previewing of Group results before and after Participant contribution.

- Allow viewing of Group results only after the Participant has contributed.
 - Do not allow viewing of Group results.
 - Make this Activity non-collaborative and only the last Participant's input will be counted.
 - Make every Participant's input public.
 - Allow Participant to make changes after contribution.
8. Click **Submit** to create the Activity or **Cancel** to abort.

Score

This Activity is a sophisticated tool that allows each Participant to rate a set of alternatives against multiple weighted criteria. The Report for this Activity shows a group and individual weighted score, with real number support, for each alternative, as well as the average score for each criterion under each alternative. A Distribution Report is also available, showing the spread of statistics within the defined limits.

1. To select the degree of abstention permitted by Participants, select from the available radio buttons: **Do not allow**, **Allow everyone**, or **Leaders only**. The Session or Activity Leader might check **Leaders only** if he/she wishes to respond to part of the ballot, but abstain from the rest.
2. The **Swap X/Y Axis** option changes the axis upon which the criteria/alternatives appear in both the Activity and the Activity Report.
3. In the Scoring Scale section, select the **Rating Type** from the scroll down menu (Always...Never, Agree...Disagree, etc.).
4. Set the **Scale** for the rating from the scroll down menu (1–3, 1–5, etc.).
5. If desired, you may enter your own scale with up to 10 choices from lowest to highest, separating each item with a comma. You must select “Do not use any of these scales” in the **Rating Type** box to use your own scale.
6. To add new criteria, type a description in the **Modify Criteria List** box. Then, select a **Weight** from the scroll down menu and click **Add**. Existing criteria may also be edited, changed, or deleted.
7. To add alternatives, type the description in the **Modify Alternative List** box and click **Add**. Existing alternatives may also be edited, changed, or deleted.
8. Click the box next to the following to set viewing **Options**:
 - Allow previewing of Group results before and after Participant contribution.
 - Allow viewing of Group results only after the Participant has contributed.
 - Do not allow viewing of Group results.
 - Make this Activity non-collaborative and only the last Participant's input will be counted.
 - Make every Participant's input public.
 - Allow Participant to make changes after contribution.

- Click **Submit** to create the Activity or **Cancel** to abort.

Action Plan

This activity allows for managing the details of projects originating from other Session Activities. Participants can assign projects; indicate status, and link projects to external dependencies. The output is a Gantt chart listing each task, assignee, and status, as well as a dependency and category-based report. Action Plan comments can also be included in the Final Report.

The screenshot displays the 'Setup Activity: Action Plan' interface. At the top, there are tabs for 'Session', 'Agenda', 'Participants', and 'Help'. The main title is 'Emergency Response Application' with a description: 'To review the capabilities of WebIQ as they would apply in an emergency response situation involving a Hazardous Waste spill'. There are 'Online' and 'Join Me' buttons. The left sidebar contains 'New Topic' and 'Meeting Tools' with various options like 'Presentation', 'Ideas', 'Collabwrite', etc. The main area is titled 'Setup Activity: Action Plan' and includes fields for 'Title' (Untitled: Action Plan), 'Instructions', 'Availability' (radio buttons for Available and Unavailable), 'Participants' (two rosters: Session Roster with Volf, Heidi and Bejarano, Raymond; Actions Roster with Bejarano, Raymond (Lead) and Volf, Heidi (Lead)), and checkboxes for 'Do not count Session Leaders for participation' and 'Activity Leader'. Other settings include 'Receive Transfer Updates', 'Show ID stamps', 'Disable new entries', 'Disable commenting', 'Max. commenting depth' (No limit), 'Ideas default collapsed', 'Skip weekends on auto-dates', 'Categories' (No Categories), 'Modify Category List' (Add/Delete), 'Screen Refresh Code' (radio buttons for No screen change, Refresh to Bottom, Refresh to Newest), and 'Numbering' (radio buttons for Simple, Outline, Legal, None). At the bottom, there are 'Submit', 'Send notices', 'Import Ideas', and 'Cancel' buttons.

Action Plan Activity Set-up Screen

An action item or task can also be assigned to a person outside the Session. To do so, go to the Action Plan Activity screen itself. Select the task to be assigned, and select **OTHER** from the scroll down menu. A pop-up will appear, asking for the name to assign to the chosen task. Type in the person's name. He or she will not be added to the Group Roster, but will appear in the Action Plan Report.

- Clicking in the **Show ID stamps** box, will allow you to identify which items were contributed by which Participants.
- Disable new entries** will allow Participants to view items that have been gathered, but will not allow them to submit new items.

3. **Disable commenting** will remove the Participants' ability to comment on the items gathered.
4. **Maximum Depth** will set a limit on Participant commenting, thus limiting the growth of commenting trees.
5. Ideas may be presented in either collapsed or expanded form. If **Ideas default collapsed** is checked, ideas that have subordinate comments are shown with a **+** to the left of the idea number. The idea's comments may be shown by clicking on the **+**. If **Ideas default collapsed** is not checked, comments are shown under their ideas. A **-** appears to the left of the idea number. The idea's comments may be hidden by clicking on the **-**.
6. The **Skip weekends on autodate** option allows the Leader to decide whether or not to include weekends when planning out the duration period.
7. Add/Delete/Modify categories by typing in the **Modify Category List** window and clicking **Add** or **Delete**.
8. The Action Plan Activity screen is subject to a periodic refresh cycle. This setting determines the view after a Refresh. The first option, **No screen change**, allows the first item on the screen to remain visible. With the second option, **Refresh to Bottom**, the view may be changed so that the last item submitted is always visible. With the third option, **Refresh to Newest**, the view may be changed so that it includes the last item that was submitted.
9. When selecting a method for numbering the list, choosing **Simple** will apply the 1, 2, 3 numbering style for all levels of ideas and comments. The **Outline** style uses a Roman numeral for each idea, a capitalized letter for each comment, and an Arabic numeral for comments to comments. The **Legal** style applies the numbering scheme common in legal documents (i.e. 1.2, 1.2.1, 1.2.1.a).
10. Click **Submit** to create the Activity, or **Cancel** to abort.

In the Action Plan activity, each item has its current status data displayed, along with a **Modify** button which, when pressed, will allow that item's data to be changed without affecting the other items. Changes to modified items will be instantly reflected in the activity screen.

The **Start Date** always defaults to the current date and can be modified accordingly. The **End Date** will be automatically calculated after entering a Duration value greater than or equal to 0.

In addition to being able to make an item directly dependent on another specific item, users are able to make an item dependent on its relative "previous item" on the activity list. In other words, if the item numbered 4 on the activity screen is designated as being dependent on the "previous item," it will always be dependent on item 3. This can be changed by simply moving item 4 up or down on the list. If every item but the first one has been so treated, the Action Plan activity can, based solely on the Durations entered for each item, automatically calculate the Start date for each subsequent dependent item based on the Start date of the first.

Session	Agenda	Activity	Participants	Message	Resources	Help
Planning the Implementation of the Remedial Actions						
Instructions:		Please update the project plan as required. Please click on the "Modify" button to complete each of your updates.				<input type="button" value="Online"/>
<input type="button" value="Participation"/>						
1. Determine the remedial action(s) to be implemented						
Assign to:	Volf, Heidi		Start date:	4/14/2005		<input type="button" value="Modify"/>
Status:	In Progress		Duration:	1 Days		
Dependencies:	No dependencies		End date:	4/14/2005		
2. Identify the assets that are required to implement the remedial action(s)						
Assign to:	Bejarano, Raymond		Start date:	4/15/2005		<input type="button" value="Modify"/>
Status:	Pending		Duration:	3 Days		
Dependencies:	Determine the remedi...		End date:	4/17/2005		
3. Develop a timeline for the acquisition of those assets						
Assign to:	Entire group		Start date:	4/18/2005		<input type="button" value="Modify"/>
Status:	Pending		Duration:	3 Days		
Dependencies:	Identify the assets ...		End date:	4/20/2005		
Determine the remedial action(s) to be implemented						
Assign to:	<input type="text" value="Volf, Heidi"/>		Start date:	<input type="text" value="4/14/2005"/>		<input type="button" value="Submit"/>
Status:	<input type="text" value="In Progress"/>		Duration::	<input type="text" value="1"/> Days		<input type="button" value="Cancel"/>
Dependencies:	<input type="text" value="No dependencies"/> <input type="button" value="Add"/> <input type="button" value="Delete"/>					

Action Plan Activity Modify Action Screen

Questionnaire

With the Questionnaire Activity, Participants are asked to respond to one or more questions. Following Activity setup, the Session or Activity Leader will use a screen similar to the Agenda Designer that supports the creation of the Questionnaire. A Questionnaire may include questions of the following types: Open-Ended, Rate, Rank, Vote, Allocate, and Select. The functionality of these question types is similar to their corresponding WebIQ Activity tools. There are also pre-defined, but customizable, demographic questions for gender, age, and education.

1. **Disable commenting** will remove the Participants' ability to comment on the items gathered.
2. Items may be presented in either collapsed or expanded form. If **Ideas default collapsed** is checked, items that have subordinate comments are shown with a **+** to the left of the item number. The item's comments may be shown by clicking on the **+**. If **Ideas default collapsed** is not checked, comments are shown under their item. A **-** appears to the left of the item number. The item's comments may be hidden by clicking on the **-**.
3. Select a method for **Numbering** the questions list. Choosing **Normal** will apply sequential numbering across sections. Choosing **Sectional** will apply restart numbers for each section.
4. Click the box next to the following to set viewing **Options**:
 - Allow previewing of Group results before and after Participant contribution.

- Allow viewing of Group results only after the Participant has contributed.
 - Do not allow viewing of Group results.
 - Make this Activity non-collaborative and only the last Participant's input will be counted.
 - Make every Participant's input public.
 - Allow Participant to make changes after contribution.
5. Click **Submit** to create the Activity or **Cancel** to abort.

Questionnaire Construction

The WebIQ Questionnaire Activity supports six types of questions: Open-Ended, Rate, Rank, Vote, Allocate, and Select. In addition, there are three pre-defined (but modifiable) demographic questions. A question is created by entering text and then clicking on the **Next** button to set options. Question level options determine whether abstentions are allowed and are used to control settings specific to the question type. Once the options have been determined, click the **Submit** button to save the choices; clicking the **Cancel** button will save the question text without its options.

Questions may be grouped into sections. Once they have been created, questions may be moved from one section to another; they may also be reordered within a section. Questions may be promoted to sections and sections may be demoted to questions.

Questions may also be changed from one type to another.

A Participant may be allowed to abstain from answering questions. Additionally, **Skip Logic** may be added to a question so that the answer to the question triggers an automatic bypass of one or more subsequent questions.

Questionnaire Sections

Questions may be grouped in sections. The numbering of questions within a section is controlled by the **Numbering** option for the Questionnaire Activity.

Questions may be moved from one section to another. The browser being used may support drag-and-drop movement. Alternatively, a question may be moved by first selecting the target section and then the question to be moved. Once the question is selected, a set of buttons will appear in the lower portion of the screen. Click the **Section** button to move the question.

Within a section, questions may be reordered by selecting them and using the up/down **Reorder Selected** buttons.

Questionnaire: Open-Ended Question

An Open-Ended question allows the Participant to reply freely to the question. When creating or modifying an Open-Ended question, two options may be set: **Allow Abstentions** and **Maximum Entry Length** (limiting the number of characters that a Participant may enter into the text box provided).

Questionnaire: Rate Question

A Rate question allows the Participant to select text (that is tied to a numeric value) to reflect his/her answer to the question. The options for a Rate question **Allow Abstentions** and determine the responses that can be offered. Six pre-defined

Questionnaire Screen

Rating Types (sets of responses) are available; these can be assigned numeric value ranges from 1 up to 3, 4, 5, 6, 7, or 10. Alternatively, the Session or Activity Leader may provide up to 10 choices for the Rating Scale. (Note: If the **Allow Abstentions** option was selected during question creation, an **Abstain** item will be added to the list of Rating Types.)

Questionnaire: Rank Question

A Rank question allows the Participant to rank a set of options. Once the question has been written, its options (items to be ranked) may be added by selecting the question and then clicking its **Option** button.

Questionnaire: Vote Question

For a Vote question, the Participant is presented with the question followed by radio buttons for **Yes** or **No**. If the **Allow Abstentions** option was selected (when the question was created or modified), a third radio button **Abstain** will be presented.

Questionnaire: Allocate Question

An Allocate question allows the Participant to allocate resources over one or more options. When creating or modifying an Allocate question, three settings affect its behavior: **Amount to allocate** (specify a minimum and maximum); **Allocate range** (for all options or per option) and **Units Label** (default is UNITS). Once the question has been written, its allocation options may be added by selecting the question and clicking its **Option** button.

Questionnaire: Select Question

A Select question allows the Participant to select one or more options. When creating or modifying a Select question, specify the **Number to select**. Once the question has been written, its options may be added by selecting the question and clicking its **Option** button.

The screenshot shows a questionnaire design interface for a section titled "Children". On the left sidebar, there are sections for "Section" and "Demographics" (Gender, Age Group, Education). Under "Section", there are options for "Ques. Types": Open-Ended, Rate, Rank, Vote, Allocate, and Select. Under "Demographics", there are buttons for "Edit", "Delete", "Reorder Selected" (with up/down arrows), and "Skip Logic".

The main content area shows three questions:

1. How many children do you have? (1) 0
4. I prefer the indoors.
5. My favorite indoor activities include:

Below the questions, it states "Skips 2 Questions when option (1) 0 is selected". At the bottom, there are buttons for "Submit", "View Results", and "Save". A small note at the bottom left says "Click on an item to select it for editing, reordering, deleting, or to add a comment."

Questionnaire Screen with Skip Logic

Questionnaire: Demographic Question

Three pre-defined demographic questions are available for gender, age, and education level. These questions are pre-configured Rate questions. As such, the text messages that are presented to the Participant may be easily customized. (Be sure to click the **Submit** button to save the Rate Selections even if the defaults are desired.)

Questionnaire: Skip Logic

In some cases, the answer to one question may make the answers to related questions meaningless. The WebIQ Questionnaire tool allows conditional skipping of questions.

For example, if a Participant has no children, he/she should not have to answer questions related to children. In this case, when creating the questionnaire, the Session or Activity Leader might create a Rate question that allows the Participant to select his/her number of children. Two follow-up questions might ask for the names of the children and favorite family activities. An answer of "0" to the question about the number of children would trigger the **Skip Logic** that bypasses the next two questions. Thus, the response to one question triggers the execution of **Skip Logic**.

In order to associate **Skip Logic** with a question, select the trigger question and then click the **Skip Logic** button. Specify the number of questions to skip and the conditions under which they will be skipped. In the following example, a Rate question, "How many children do you have?" has been selected to trigger the **Skip Logic**.

The Session or Activity Leader should now specify the number of questions to skip and the condition under which the **Skip Logic** will be executed. After specifying that 2 questions should be skipped when the Participant has no children, the question assumes the following appearance. (The comment indicating that questions will be skipped only appears in Design view. When a Participant is accessing the questionnaire, the display will be dynamically modified. When **Skip Logic** is triggered, the "skipped" questions will be removed from the display.)

It is also possible to stagger the skipped questions. Suppose Question A is set to trigger the next 3 questions to be skipped. Suppose further that the Session or Activity Leader also wants to skip another set of questions further down, starting

with the first question after a Question Z, based on the same condition defined for Question A. This can be done as follows: Question Z should be selected and the **Skip Logic** button pressed. On the **Skip Logic** options screen, the checkbox labeled “or based on previous skip logic” should be selected. On the **Skip Logic** screen, which appears, Question A should be selected from the drop down box, and the number of questions to skip after Question Z should be entered.

Questionnaire: Skip Logic Conditions

The conditions that control **Skip Logic** depend on the type of question that is used as a trigger.

Open-Ended. The Participant’s answer may be constrained to contain or not contain the text specified by the Session or Activity Leader when the **Skip Logic** is defined.

Rate. The Session or Activity Leader specifies one of the rate values and then elects to execute the **Skip Logic** if the Participant selects (or does not select) the specified rate value.

Rank. The Session or Activity Leader specifies one of the items to be ranked and then elects to execute the **Skip Logic** if the specified item is ranked first (or is ranked last).

Vote. The **Skip Logic** is triggered when the Participant’s answer is equal to (or not equal to) **Yes**, **No**, or **Abstain**. (**Abstain** will appear only if abstentions are allowed for the question.)

Allocate. The Session or Activity Leader specifies a value and then elects to execute the **Skip Logic** if the allocation total is greater than, equal to, or less than the specified value.

Select. The Session or Activity Leader chooses one of the selection options and then elects to execute the **Skip Logic** if the specified option is selected (or not selected).

The Questionnaire Activity allows the Session or Activity Leader to build an Activity Report based on the input of Participants who meet a particular set of criteria. The **Filter Criteria** are based on how those Participants have answered one or more questions in the previous Activity. See page 55 for more information.

Specific Ballot-Type Activity Functions

The preceding evaluation Activities, also referred to as “Ballot-type Tools,” contain a variety of control or management functions, within each Activity. Some of these functions are available to the Participants as well as the Session or Activity Leader.

The following control tools are available at the bottom of each Ballot-type Tool Activity screen.

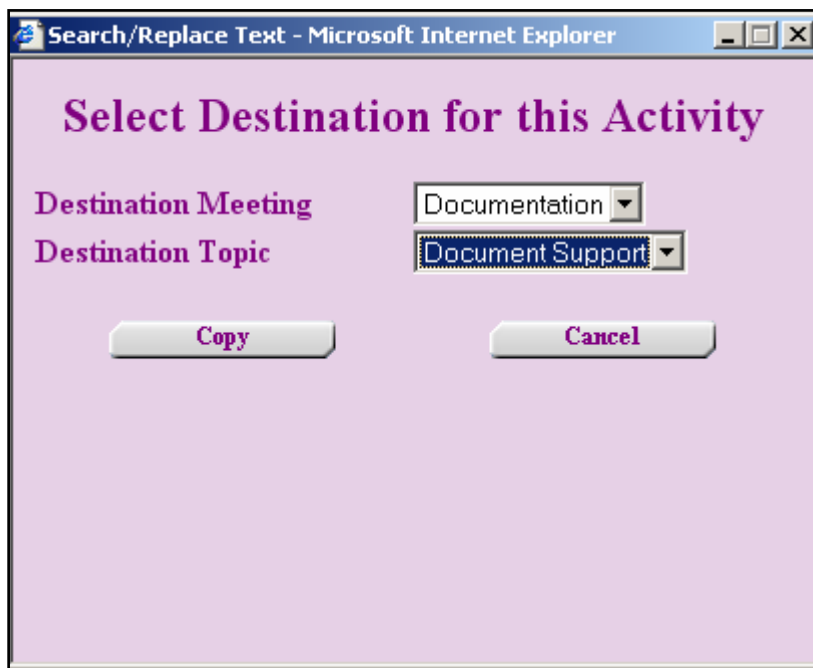
1. **Expand** provides for the list of items to be displayed in its entirety in outline form, with items and then comments listed underneath.
2. **Deletions** provides the Session or Activity Leader with the ability to make multiple deletions of items. Selecting **Deletions** will bring up a new screen where items are listed with checkboxes. The Session or Activity Leader can then check any and all boxes corresponding to the items he/she wishes to delete.
3. **Collapse** provides for only the header items to be displayed, without the comments underneath.

Copying Agenda Activities

A copy of an Activity may be created from the **Agenda Designer** screen. This copy will include all the Activity settings and the data within it.

Copying an Activity

1. Select the **Activity** to copy by clicking its link in the **Agenda Designer** screen (it will be highlighted in red).
2. Click the **Copy** button located in the tool bar. The new Activity will be added after the last Activity within that Topic. Its name will be “Copy of” followed by the name of the source Activity.
3. An **Activity** can also be copied into another Session and Topic using the **Copy** button. When on the **Agenda Designer** screen, if an Activity is highlighted, the **Copy** button will bring up a pop-up screen for designating the destination Session and destination Topic.



Copy Pop-up

Deleting Agenda Topics/Activities

Deleting an Activity can be done from the **Agenda Designer** screen

Deleting Topics or Activities

1. Select the **Topic** or **Activity** to delete by clicking its link in the **Agenda Designer** screen (it will be highlighted in red).
2. Click the **Delete** button located in the tool bar.
3. To confirm the delete click **OK**, or **Cancel** to abort.

Modifying Agenda Topics/Activities

Modifying Agenda Topics or Activities

1. From the **Agenda Designer** screen, select the **Topic** or **Activity** to modify by clicking on it once (it will be highlighted in red).
2. Click the **Edit** button.
3. For a Topic, rename the Topic in the resulting dialog box and click **OK** (or **Cancel** to abort changes).
4. For an Activity, make the necessary changes to the fields and click **Submit** (or **Cancel** to abort changes).



*The Activity settings screen can also be accessed from the **Activity Menu** item that appears within the Menu Bar of the Activity.*

Rearranging the Order of Agenda Topics/Activities

1. From the **Agenda Designer** screen, select the **Topic** or **Activity** to move by clicking on it once (it will be highlighted in red).
2. **Click** the green up or down **arrows** located in the tool bar to move the Topic or Activity.
3. You can click on a **Topic** or **Activity** and drag it on top of another Topic or Activity. If you drag a Topic or Activity up, it will be placed in front of the item it is dropped on to. If you drag a Topic or Activity down, it will be placed after the item it is dropped on to.

Rearranging the Order of Ideas within Activities

Rearranging the Order of Ideas within an Ideas Activity

Once a Session is under way and submissions are being made into an Ideas Activity, the Session or Activity Leader has the ability to move or rearrange the order of ideas presented to Participants.

1. Access the particular Ideas Activity from the Agenda screen.
2. **Select** the particular idea to move by clicking on it once (it will be highlighted in red).
3. Drag or drop ideas into the desired priority. For browsers not supporting drag and drop, the up/down arrows move the ideas (drag and drop is supported by MS Explorer® 5.0 or greater).

Transferring Ideas between Activities

A **Transfer** allows the movement of data from one WebIQ Activity to another. Transfers are defined by specifying the source and target Activities. Within those Activities, the element to be transferred (e.g., idea and/or categories) is specified as well as the manner in which it will be received in the target Activity.

Advanced Transfer criteria allow specification of conditions under which the Transfer will occur. Other Advanced Transfer options control the transfer of comments, tracked changes, and unassigned ideas. Lastly, Advanced Transfer

Main Transfer Options Screen

options allow definition of a Transfer with deferred execution. For example, when using the **Selected Items** option on the **Advanced Transfer** screen under **Source Items**, having selected the **Transfer Comments** option, the comments will also be displayed for Transfer.



Transfers are designed to move items into and out of Activities, depending on the limits set by the Group or Session Leader. Based on an individual user's rights, he or she is able to transfer into or out of any Activity within any other Activity, Session or Group. Consequently, multiple Transfers can be made using the same source, with destinations to the Activity in the same Session, or Activities in Sessions in other Groups and Corporations within the system.

Transfers of all ideas or items are persistent until deleted or until the target Activity has been participated in. In other words, a Transfer that has already been executed will continue to perform Transfer Updates as new ideas and items are submitted to the source Activity. If the target Activity's setting for **Receive Transfer Updates** is enabled, these updates will occur even after the target Activity has been participated in.

Creating a Transfer

1. From the **Agenda Designer** screen, select the source Activity from which to make a Transfer by clicking on it once (it will be highlighted in red).
2. Click the **Transfer** button located in the tool bar.
3. Define the **Transfer Source**:
 - Select the source **Session**.
 - Select the source **Topic** within the chosen Session.
 - Select the **Activity** from the existing Activities within that Topic.

- Select whether **All Ideas** or **Selected Ideas** are to be transferred.
4. Define the **Transfer Destination**:
 - Select the target **Session**.
 - Select the target **Topic** within the chosen target Session.
 - Select an **Activity** from the existing Activities within that Topic.
 - Select whether or not the **items** will be copied as ideas (for a Categorize Activity as ideas or categories) or as criteria or alternatives (for a ballot-type Activity, such as Score or Vote).
 5. Click the **Save/Transfer** button to create the Transfer.
 6. Or click **Cancel** to return to the Agenda and abort the Transfer.



Note: WebIQ will attempt to intelligently promote ideas to categories or comments to ideas where appropriate. WebIQ will also intelligently demote categories into ideas and ideas into comments where appropriate. For instance, if categories and ideas is chosen under the source Activity and ideas under the destination Activity, WebIQ will automatically make the source ideas into comments in the destination Activity. If ideas and comments are chosen in the source Activity and categories in the destination Activity, the comments will become ideas in the destination Activity.



Note: If the Session Leader chooses to transfer only selected ideas, after clicking “Save/Transfer”, he/she will be prompted to select the ideas to transfer.



Note: When creating a Transfer from a Categorize Activity to any other (such as Ideas), and if that Transfer has “Selected Items” designated as the source items type, then, on the Advanced Options screen for the Transfer, under “Transfer Criteria,” the option to categorize the selected ideas based on a selected category in the destination may be chosen. Options exist for single and multiple category assignment.



Note: Transfers between two Questionnaires yield target questions in the same form as the source. Transfers between the other Activity Tools and the Questionnaire Tools are supported.



*Note: When transferring from other tools into the Questionnaire Tool, there are three **Transfer data as** options: Questions; Questions, Sections; and Same As Source. In general, transfers from another Activity Tool to the Questionnaire Tool with data transferred as Questions or Same As Source will yield open-ended questions. When a Questionnaire-targeted Transfer uses Transfer data as, Questions, Sections, the results are Sections.*



*Note: There are some exceptions to the previously stated generalities. In each case, the source Activity has categorized ideas. For all of these Transfers, **Ideas/Items & Categories** are transferred as Questions. These exceptions follow:*



Source Activity Type	Resulting Question Type
Rate	Select
Rank	Rank
Vote	Select
Allocate	Allocate
Select	Select

Transfers from the Questionnaire Tool (a composite tool) to other Activity Tools should be done using the **Selected items** option in the Transfer source. These Transfers can transfer items into the Ideas, Discussion, Organize, Categorizer, Vote, Score, and Action Plan Activities, as well as structured questions into the Rate, Select, and Allocate Activities.

Advanced Transfer Options Screen

Many Activities (e.g. Rate or Rank) do not allow the typing of items directly. Items or ideas must be **Transferred** from another Activity. These Transfers can be defined and saved for execution until a defined event, a **Trigger** or **Criterion**, occurs (i.e. pending completion of an Activity and execution of the **Transfer Now** command by a Session Leader), or they can be defined and executed immediately.

The Session Leader can create a **Transfer** that is triggered with a **Transfer Now** button, which will only copy selected ideas that may not be defined at the time the Transfer is created (i.e. creation of a Transfer for an Ideas Activity that has not yet been started, hence has no ideas). If the Session Leader chooses to delay selecting specific ideas until he/she executes the **Pending Transfer**, when he/she clicks the **Transfer Data** button, he/she will be presented with ideas to select from on a new screen.

The Session Leader has the option of transferring comments associated with ideas, or just ideas. He/she can transfer tracked changes, or transfer the ideas in the revised or

original format. He/she can transfer unassigned ideas or ideas that have been assigned to a specific category. He/she can also transfer ideas in either the order they appear in the original contribution or the order of the evaluated results.

The Session Leader can create a **Transfer** that is set to **Trigger on full participation**. When all Participants have contributed to the evaluation Activity designated as the source, the Transfer will be executed and the ideas will be copied from the source to the destination.

The Session Leader can create a **Transfer** that is set to **Trigger on Date/Time**. Designate a time and date in the **Advanced Transfer** tab of the **Transfer Data** screen. When that date and time is reached, the Transfer will be executed and the ideas will be copied from the source to the destination.

Transfer Criteria allows the selection of ideas for transferring to be automated, so that only the ideas you want to transfer get transferred. The system selects them depending upon the criteria you set up. The criteria available depend upon what sort of Activity you are transferring ideas out of. Transfer Criteria are only available when the source Activity is an evaluation or Ballot-type Activity. The Transfer Criteria settings are available on the Advanced Transfer screen, which provides options for determining which ideas will be transferred.

Ideas will be automatically selected if the **Selected Ideas** option is used, if a trigger is used, or if the Session Leader activates a Transfer. The options available will depend upon the type of source Activity:

- **Categorizer** will select ideas by the number of votes, by the percentage of votes, or by the majority votes.
- **Rate, Rank, Allocate, and Score** will transfer by minimal numeric score, number rating above X, percentage rated above X, maximum numeric score, number rating below X, and percent rating below X. It also has a “Do not use transfer criteria” option.
- **Select** will transfer by number of times selected, percentage of times selected, number of times not selected, and percentage of times not selected. It also has a “Do not use transfer criteria” option.
- **Vote** will transfer by number affirmative, percentage affirmative, number negative, and percentage negative. It also has a “Do not use transfer criteria” option. The **Transfer Criteria** drop-down has two fill-in boxes that cover the parameters for the several selections (percentages, numeric counts, participation ratios, etc).



*When transferring from a **Rate** Activity to a **Score** Activity, the criteria and weights will automatically be transferred as criteria (not alternatives).*



Note: Transfers have the ability to combine the results from evaluation-type Activities (such as Rate, Questionnaire, Vote, etc). The Activities must be of the same type (both Rate, both Vote, etc) and the destination Activity must contain copies of the same evaluated ideas as the source, through either the Copy command, loading an Activity from a WIQ file, or through the Transfer itself. By fulfilling these requirements, and selecting the “Transfer Results” checkbox on the Advanced Transfers tab, the results from the Source Activity(s) will be merged with the results in the Destination Activity.

Modifying a Transfer

1. From the Agenda Designer screen, select the **Transfer** to modify by clicking the specific Transfer link text (i.e. **Ideas** Transfer to **Rank**) located beneath the associated Activity.
2. Modify the **Transfer Source** fields as desired.
3. Modify the **Transfer Destination** fields as desired.
4. Click the **Advanced Transfer** tab to modify the Transfer trigger.
5. Click the **Save/Transfer** button to modify the Transfer and return to the Agenda screen.
6. Or click the **Cancel** button to return to the Agenda and abort modifying the Transfer.

Executing a Pending Transfer

- From the **Agenda Designer** screen, click the **Transfer Now** link (i.e. Pending **Ideas** Transfer to **Rank** [TRANSFER NOW]) located beneath the associated Activity.



The Transfer Data screen automatically defaults to the transfer of the link selected. Always verify this before modifying the trigger for the Transfer.

Deleting a Transfer

1. From the Agenda Designer screen, click any **Transfer** link.
2. Select the specific Transfer to delete from the **Existing Transfers** scroll down menu.
3. Click **Delete**.
4. To confirm the deletion click **OK**, or **Cancel** to abort.

Sending Invitations to Start a Session

Once a Session has been created and the Agenda's Activities have been defined, a Session Leader can send email **Invitations** to all Participants. These invitations serve as a mechanism to control when a Session begins. Invitations are sent to all Participants who have been included in the Session Roster (for **Participants Only** Sessions). For those Sessions that are **Open to the public**, invitations are sent to all members defined in the Group Roster. For Open to the Public Sessions, a Session Leader can send invitations to any individual who has a known email address. Finally, a Session Leader can also send out invitations through his/her browser email by copying and pasting the hyperlink to the invitation in the body of his/her email.

Session Invitation Screen

Send Invitations to a Participants Only Session



This should be a Participants Only Session in which Topics and/or Activities have been created in advance.

- From the Session Settings screen, check the **Send Invitations** box (next to Submit) and click **Submit** to send email invitations to all Participants.

Send Invitations for an Open to the Public Session



This should be an Open to the Public Session in which Topics and/or Activities have been created in advance. (Note: Only the Questionnaire Activity is allowed)

1. From the Session Settings screen, check the **Send Invitations** box (next to Submit) and click **Submit** to send email invitations to all Participants.
2. The **Submit settings changes and go to the send invitations screen?** prompt will appear. Click **OK**, or **Cancel** to abort.
3. From the resulting **WebIQ Email** screen, modify the set of email Participants as required:
 - **Delete** Participants from the Roster by selecting their name from the **Recipients** scroll down menu and click **Delete**.
 - To modify email addresses select a name from the **Recipients**, edit the address in the **Edit** field, and click **Change**.
 - To modify the message, edit the **Subject** and **Body Text**.
4. Click the **Send IQ-Email** button.



*The Session Leader may also send email by using his/her browser's email client (click the **Use Browser Email** radio button at the top of the screen). If he/she chooses to use his/her browser's email client, then he/she is presented with a new message window from the normal email client application, already populated with the Participants from the **WebIQ Mail** screen. With this message, the Session Leader can add, delete, or modify Participants as he/she normally would. He/she may also send the email as an attachment (this is particularly helpful for Lotus client users who cannot interpret HTML) or even communicate with the Participant's MS Outlook® calendar file.*

Sending Invitations to New Participants in an Open to the Public Session

1. Select the **Open to the Public** Session to which to invite Participants by clicking on its link from the **Join A Session** screen.
2. From the resulting Agenda screen, select **Session** from the menu bar and click **Settings**.
3. Check the **Send Invitations** box and click **Submit**.
4. The **Submit settings changes and go to the send invitations screen?** prompt will appear. Click **OK**, or **Cancel** to abort.
5. From the resulting **WebIQ Email** screen, modify the set of email Participants as required:
 - **Delete** Participants from the Roster by selecting their name from the **Recipients** scroll down menu and click **Delete**.
 - To modify email addresses select a name from the **Recipients**, edit the address in the **Edit** field, and click **Change**.
6. To modify the message, change the **Subject** and **Body Text**.
7. Click the **Send IQ-Email** button. This email will contain a hyperlink to a special log in screen with a special button for the Participant to define his/her own profile. A Group Leader can disable this profile creation option when the **Users never create their own accounts** box has been checked on the Group Administration screen.



A Session Leader can also forward email invitations received to any new Participant. The system will allow as many concurrent new Participants to access the Questionnaire(s) within a Session as there are unassigned active Session Roster names available within a corporation.

Adding Resources

This feature gives the ability to attach Documents to Activities and Sessions, as well as list hyperlinks to websites as additional resources for a successful Session.

Document Attachments

Files of any type may be attached to an Activity or Session using this function.

1. Select **Resources** from the main menu bar and click **Documents**.
2. The **Document Resources** screen appears.
3. In the **Attachment Description** text box, add a description.
4. Click the **Browse** button to locate the specific file to upload.
5. Once located, click the **Add Attachment** button to begin uploading the document.
6. After the document is uploaded, it will display an icon and an **Edit** button for editing the description, uploading a new document, or deleting the document.



To add a document to an Idea or Comment, select an idea or comment in any Activity by clicking it. Now, click the Attach button in the lower left-hand corner. Repeat steps 3 through 6 listed above.

Session | Agenda | Activity | Participants | Message | Resources | Help

Document Resources

(Volf, Heidi) (Edit) (webiq test doc.doc, 24064 bytes)

(Volf, Heidi) (Edit) (webiq test doc.doc, 24064 bytes)

(Volf, Heidi) (Edit) (webiq test doc.doc, 24064 bytes)

Large attachments may take a long time to upload. The attachment will not be available until the upload has completed. Please do not attempt another upload until this one completes.

Attachment Description:

File to attach:

Document Resource Screen

Web Resources

Hyperlinks may be added as a resource to an Activity or a Session using this function.

1. Select **Resources** from the main menu bar and click **Links**.
2. The **Web Resources** screen appears.
3. Enter the **URL address** and a brief **description** in the provided text boxes.
4. Click the **Add item** button to add the link to the resources page.
5. Clicking the hypertext description listed in the resources area will launch a browser displaying the site.
6. Once the hyperlink is added, an **Edit** link is provided to edit or delete the hyperlink.

The screenshot shows a web application interface with a navigation bar at the top containing the following tabs: Session, Agenda, Activity, Participants, Message, Resources, and Help. The main heading is "Web Resources". Below the heading, there is a list of three resources, each with a blue "(Edit)" link to its left:

- (Volf, Heidi) (Edit) Web IQ home page
- (Volf, Heidi) (Edit) Search engine research
- (Volf, Heidi) (Edit) Implement marketing strategy

At the bottom of the screen, there is a form to add a new resource. It consists of two text input fields: "Description" and "The URL". To the right of these fields are two buttons: "Add Item" and "Back".

Web Resource Screen

Results and Reports

The purpose of a WebIQ Session is to gather Participant input using a variety of tools. A significant output of the Session is the **Closure Report**. The Closure Report is intended to be used as a Final Report on the Session.

Prior to closure, the Session Leader may view Activity results or generate Session Reports. The Activity Leader may also view Activity results or generate Activity Reports for the Activity he/she leads. All of the Activities provide for customizable views of their results through various Report types and **Filters**.

Activity Results

Most of the WebIQ Activity tools may be configured to control Participant access to Group results for that Activity. By default, when Participants submit their input, they are automatically taken to a display that contrasts their inputs with the rest of the Group's results. A Session Leader may also select the Participant whose results are viewed. Reports can include Activity Instructions, if desired. A **Chat Report** can also be generated.

For a few Activity tools, the content entry display always shows all "results" and there is no separate Group results display until Reports are generated. This is the case for the **Ideas**, **Discussion**, and **Organizer** tools.

For the **Categorize** tool, the results are shown in a table with column names that correspond to the offered categories with ideas named in the rows (to be categorized). The intersecting cell contents show the number of times the idea was assigned to the category.

The **Rate** or **Rank** tool results defaults to a Categorized High/Low Report. From that display, a Participant can cycle through either categorized or composite views of the Frequency Distribution, Range Graph, and Average and Standard Deviation Graph. In the **Rate** tool, if more than one criterion is selected, an XY Plot and an Average and Standard Deviation Chart are also available.

For **Vote**, **Select**, **Allocate**, and **Score**, the results display shows a composite of items in descending order based on the number of votes, frequency of selection, amount allocated, or scoring. For all except the **Score** tool, a Participant may toggle between composite and categorized views. The **Score** tool also provides a Distribution Report.

(Note: These Activity Group results displays correspond to selections that may be added to the Session and/or Closure Reports.)

Agenda Filter Report Support

Filter support for the entire Agenda allows the Session or Activity Leader to build an Activity Report based only on the input of Participants who meet a particular set of criteria. The **Filter Criteria** are based on how those Participants have answered one or more questions in an Activity or series of Activities.

For example, suppose Participants entered their demographic information into a Questionnaire Activity. In the Questionnaire, the Participants answer a series of demographic questions, such as: “What is your age?”, “What is your gender?”, “What state are you from?”, etc. In the Rate Activity, the Participants can rate a series of ideas. From the Rate Activity, the Session or Activity Leader can view the results of ALL the Participants who have rated the ideas in this Activity. If the Session or Activity Leader does not need to know how ALL the Participants rated ideas, but only how women, people from Ohio, or the 24 to 35 age group rated the ideas, **Filters** can then be defined.

Because the Participants responded with demographic information in the Questionnaire Activity, the Session or Activity already has all the information needed to generate a more specific Rate report. By clicking on the **Filters** button at the bottom of the Rate report screen, a **Filter** can be created in the Rate Report screen that specifies the **Filter Criteria** to consider only those who answered “Male” on the Gender question in the Questionnaire Activity. This will generate a Report that shows Rating scores ONLY from Participants who are Male.

ANOTHER **Filter** can be defined, based on the Age question in the Questionnaire. The term **AND/IF** is used to denote that BOTH **Filter Criteria** must be present before the rating scores are counted. The newly generated Report screen will show the cumulative rating scores of Participants who answered “Male” to the Gender question, and “30 to 39” on the Age question.

The above is only an example. **Filter** options appear in almost all evaluation-type Activities, and **Filter Criteria** can be based on answers given in ANY other Activity, or in the SAME Activity. Also, each Activity may contain a complex set of **Filters**, conjoined by **AND/IF** or **OR/IF**. Furthermore, the Session Leader can select a series of Reports within the Closure Activity and then by clicking on the **Filters** button, create a Report that is conditioned based on the series of **Filters** that is selected for the various Activities represented in the report; including the information gathering activities such as Ideas and Organizer (information gathering Activities must be attributable in order for the system to filter the data contained in them).

To create a **Filter**, the Session or Activity Leader goes to the Results or Report screen for an evaluation-type Activity (such as Rank, Rate, Vote, Select, Categorize, Allocate, or Questionnaire). From there, he/she clicks on the **Filters** button. This will bring up the **Filters Definition Screen**. This is where criteria will be defined, which will “filter” the Participants whose input the Activity the Session or Activity Leader wants displayed. One or more **Filter Criteria** can be defined on this screen. Each criterion begins by selecting the Activity upon which the criterion is based, followed by the specific idea, and then the responses, which must be given for the criterion to be met. Each subsequent **Filter** can then begin with **AND/IF** or **OR/IF**, to show its association with the previous **Filter Criteria**. Associations are always made from left to right. If there are three **Filter Criteria**, A, B, and C, and the association is in the form A **OR/IF** B **AND/IF** C, then it will be interpreted as ((A **OR/IF** B) **AND/IF** C).

Once the **Filters** are defined, and the **Filters Definition Screen** is closed, the Report for the Activity will change to reflect a new view based on the criteria being

used. (Note: These selections persist until replaced and will be used in generating Session Reports, Closure Reports, and Transfers.)

Questionnaire Activity Results

The WebIQ Questionnaire tool allows the Results for each question to be handled in a manner that is analogous to its Activity tool. In addition, Questionnaire Reports may be subjected to filtering conditions like the ones mentioned above. The Session or Activity Leader picks Reports to include in a Results view and also builds the Report Filters.

Question Report Choices

For **Open-Ended** questions, the Standard Report includes the question followed by attributed responses.

For **Rate** and **Rank** questions, the selectable Reports include **Composite** (a High/Low Report), **Ranges, Deviations** (Average and Standard Deviation), and **Distribution** (Frequency Distribution).

For **Vote** questions, the Standard Report shows the number and percentage of **Yes, No**, and **Abstain** responses. The participation ratio is also included.

For **Allocate** questions, the high, low, and average are shown for each option.

For **Select** questions, the frequency and percentage of selection is shown for each option.

A **Comments Report** is available for all except **Open-Ended** questions.

Question Report Filters

To define a filtering condition, select the text of the question from a pull-down list. The balance of the condition will depend upon the type of question selected.

For **Open-Ended** questions, choose either “contains the text” or “does not contain the text” and then enter the filtering text.

For **Rate** questions, choose one of the following: “is equal to”, “is not equal to”, “is greater than”, “is greater than or equal to”, “is less than”, or “is less than or equal to.” Then, choose the rating value to be used in the comparison.

For **Rank** questions, choose one of the options specified when the question was defined. Then, choose one of the following: “is equal to”, “is not equal to”, “is greater than”, “is greater than or equal to”, “is less than”, or “is less than or equal to.” Lastly, pick the ranking value (a number between one and the number of options) to be used in the comparison.

For **Vote** questions, choose one of the following: “is equal to” or “is not equal to.” Then, select **Yes, No**, or **Abstain**. (Note: Abstain will be offered only if abstentions are allowed for in the question.)

For **Allocate** questions, choose one of the options specified when the question was defined. Then, choose one of the following: “is equal to”, “is not equal to”, “is greater than”, “is greater than or equal to”, “is less than”, or “is less than or equal to.” Lastly, enter the value used in the comparison.

For **Select** questions, choose one of the options specified when the question was defined. Then, choose either “was selected” or “was not selected.” Multiple filtering conditions may be defined. Multiple conditions are combined using **AND/IF** or **OR/IF**, to operators. Associations are always made from top to bottom and left to

right. If there are three **Filter Criteria**, A, B, and C, and the association is in the form of A **OR/IF** B **AND/IF** C, then it will be interpreted as ((A OR/IF B) AND/IF C).

Session Reports

This feature allows the Session or Activity Leader the ability to choose the results screens for select Topics or Activities to include in a Summary Report and **Print**, **Export** (as a .tab file), or **Email**.

A Session Report contains the Session description, start and end dates and times, Participant information, and the full Agenda followed by selected Activity Reports. Contributed comments may be included in either Session or Closure Reports. This Report option is selectable for each appropriate Activity type and the selected Activity Report is based on the **Filters** that are currently in place for the specific Activity; thereby providing the Session or Activity Leader with the ability to generate hundreds (if not thousands) of different reports, each based on a different **Filter** or view.

Creating a Report

1. Select **Session** from the menu bar and click **Report**.
2. From the **Agenda Reporter** screen, select the Topics/Activities to Report on by checking the associated checkbox.
 - For the **Ideas**, **Discussion**, and **Organizer** tools, the Report contains all ideas and categories that were provided during the Session. Unless the Session is anonymous, the idea contributors are identified.
 - Other tools allow selection of one or more Reports, including the ability to select a Comments Report. To quickly select all Reports available for the tool, click the checkbox to the left of the Activity name.
 - For **Vote**, **Select**, **Allocate**, and **Score**, the Standard Report shows items in descending order based on number of votes, frequency of selection, amount allocated, or scoring. The **Score** Report also has a report for **Distribution**.
 - **Rank** tool Report options are: **Composite** (High/Low Report), **Composite Ranges** (Range Graph), and **Composite Deviations** (Average and Standard Deviation Graph).
 - **Rate** tool Report options are: **Composite** (High/Low Report); **Composite Ranges** (Range Graph); **Composite Deviations** (Average and Standard Deviation Graph); and **Composite Distribution** (Frequency Distribution Report). If appropriate, similar selections are available by category or criterion.
 - For the **Questionnaire** tool, the Standard Report may be selected. The Report that will be generated is based upon the selections made when the Questionnaire Results were last viewed. That is, the options specified using **Pick Reports** (including **Filters**) are used to determine what will appear in the Closure Report.

3. Click the **Print** button to bring up the Print dialog window, as well as a view of the Report on the screen. Click **OK** to send the Report to a printer. When finished printing, click the **Done** link at the bottom of the screen.
4. Click the **Export** button to bring up the **File Download** dialog screen. Select **Save this file to disk**. Click **OK** to export the file, or **Cancel** to abort.



An exported Report contains the raw data for the selected Activities and is exported in .tab format. It can be easily opened and further acted upon within a spreadsheet application.

5. Click the **Email** button to bring up the WebIQ Email screen. Select the Participants to email the Report to and click **Send IQ-Email**. If a Session or Activity Leader chooses to use his/her own email client, he/she must select and copy the information in the message text and paste it into the email. The email can also be sent as an attachment.

Closure Designer

This Activity allows Session Leaders the ability to write and distribute Summary Reports to provide closure on a Session. It goes beyond a Session Report by providing the rationale and conclusions to a Session, not just a report of the Activities. A **Chat** Report can also be generated. Since this final report is intended to be comprehensive in nature, activity instructions are automatically included.

Contributed comments may be included in either Session or Closure Reports. This Report option is selectable for each appropriate Activity type and the selected Activity Report is based on the **Filters** that are currently in place for the specific Activity; thereby providing the Session or Activity Leader with the ability to generate hundreds (if not thousands) of different reports, each based on a different **Filter** or view.

Designing a Closure Report

1. From the Agenda Designer screen, click the **Closure** link in the tool bar.
2. The Closure Setup screen resembles a normal Activity setup screen. Select all appropriate functions and click **Submit**.
3. From the Agenda Design screen, click the **Closure** Activity button. The **Closure Designer** screen appears revealing a tool bar menu.
4. Click the **Title** link on the side menu to add a title for the Closure Report and click **Submit**.
5. Click the **Background** link in the tool bar to add background information on the Session and click **Submit**.
6. Click the **Participants** link in the tool bar to include Session Participant information. The names, email addresses, and participation status of all Roster members will be included in the Closure Report.
7. Click the **Decision** link in the tool bar to add information regarding the decisions made and click **Submit**.
8. Click the **Agenda** link in the tool bar to add a copy of the Agenda to the Closure Report.

Hazardous Waste Emergency Response Session Report

This report contains the outcome of the session that was conducted to address the hazardous waste spill.

Closure Designer

Title: Hazardous Waste Spill - Session Report

Participants: (Select)
Bejarano, Ray 301-578-8752 x126 rbejarano@webiq.net
Volf, Heidi 301-587-7333 hvolf@kbmggroup.com

Agenda: (Select)

Emergency Response Application

Description: To review the capabilities of WebIQ as they would apply in an emergency response situation involving a Hazardous Waste spill.

Start: April 11, 2004 12:50 PM EST
End: September 16, 2004 12:50 PM EST

Remedial Actions Generation and Prioritization

Ideas: Remedial Actions
Organizer: Organize Remedial Actions
Rate: Rate the Remedial Actions
Ideas: Develop Criteria for Remedial Action Evaluation

Print **Export** **Email** **Cancel**

Closure Designer Screen

9. Click the **Activities** link in the tool bar. This will take you to the Agenda Reporter screen where you may select which Activity Result Summaries to include in the Closure Report by checking the appropriate boxes and clicking **Submit**.
 - For the **Ideas**, **Discussion**, and **Organizer** tools, the Report contains all ideas and categories that were provided during the Session. Unless the Session is anonymous, the idea contributors are identified.
 - Other tools allow selection of one or more Reports, including the ability to select a Comments Report. To quickly select all Reports available for the tool, click the checkbox to the left of the Activity name.
 - For **Vote**, **Select**, **Allocate**, and **Score**, the Standard Report shows ideas in descending order based on number of votes, frequency of selection, amount allocated, or scoring. The **Score** Report also has a new report for **Distribution**.
 - **Rank** tool Report options are **Composite** (High/Low Report), **Composite Ranges** (Range Graph), and **Composite Deviations** (Average and Standard Deviation Graph).
 - **Rate** tool Report options are **Composite** (High/Low Report); **Composite Ranges** (Range Graph); **Composite Deviations** (Average and Standard Deviation Graph); and **Composite Distribution** (Frequency Distribution Report). If appropriate, similar selections are available by category or criteria.

- For the **Questionnaire** tool, the Standard Report may be selected. The Report that will be generated is based upon the selections made when the Questionnaire Results were last viewed. That is, the options specified using **Pick Reports** (including **Filters**) are used to determine what will appear in the Closure Report.
 - The number of Activity Participants is shown in relation to the number of Roster Participants.
10. Click the **Summary** link in the tool bar to include summary text and click **Submit**.
 11. Click the **Additional Files** link in the tool bar to attach files that were not presented within the Session, but should be included with the Session materials, and click **Add Attachment**.
 12. Click the **Attachments** link in the tool bar to attach documents from inside or outside the Session to the Closure Report.
 13. Click the **Follow-Up** link in the tool bar to add any information related to following up the particular Decision Process and click **Submit**.
 14. Click the **Print** button to print a hard copy of the Report. Click the **Export** button to export the raw data output in .tab format. Click the **Email** button to send the Report to another person via email.

Email-Based Participation

This option allows Participants to contribute via email. Session Leaders are given the option to enable email-based participation through the Session Settings screen.

If the option is enabled, when invitations are sent, the invitations will inform Participants that they have the option of contributing via email or via the web-based interface. Which Activities are sent for email participation and when they are sent is dependent upon which activities the Session Leader has made available. Participants may stop contributing via email at any time and use the web-based interface instead.

After a Participant submits his/her contributions via email, the results screen is sent back showing the number of contributions and the results up to that point. Activities without results screens, such as Ideas, are not sent back. Once all Participants have fully contributed, the final results are sent.

Email Interface Format

While every Activity has a slightly different interface, each email is organized into four standard sections. Sections are listed in the order they appear in the email.

Sessions and Activity Header

- This section is at the top of the email and contains the Session name, general participation instructions, and the Session Leader contact information.

Activity Information

- This section contains the Activity title and Session Leader instructions taken from the web-based Activity.

Activity Instructions

- This section contains the instructions for participating in the specific Activity.

Contribution Section

- This section contains the ideas themselves, as well as the area in which Participants contribute ideas, make comments, rate ideas, etc.

General Participation Guidelines

Session Leaders are given the option to enable email participation through the **Session Settings** screen. When the option is enabled, Session Leaders are also given the ability to choose the frequency with which the emails are sent. Options in the drop-down menu are: **Hourly**, every **Two Hours**, every **Four Hours**, every **Six Hours**, **Twice Daily**, **Daily**, **Weekly**, and **Bi-weekly**.

The screenshot shows the 'Session Settings' interface for an 'Emergency Response Application'. The top navigation bar includes 'Session', 'Agenda', 'Participants', 'Message', 'Resources', and 'Help'. The main title is 'Emergency Response Application' with a description: 'To review the capabilities of WebIQ as they would apply in an emergency response situation involving a Hazardous Waste spill'. A status indicator shows 'Online'. The settings are organized into several panels: 'Session' (Name, Description, Group, Language, Skin, Archived checkbox), 'Scheduling' (Start/End Date and Time, Reminders/Emails, Interval), 'Session Options' (Anonymous Session, Lock-Step Session, Disable Instant Messaging, Add/Delete Logo, Agenda Numbering), 'Participation' (Open to the public, Participants Only), and 'Session Roster' (List of participants: Bejarano, Raymond (Lead), Volf, Heidi (Lead), with a 'Session Leader' checkbox). At the bottom are 'Submit', 'Delete', and 'Cancel' buttons, along with checkboxes for 'Send invitations' and 'Save session as template'.

Session Settings Screen

When the first Activity email is sent, and in all subsequent Activity emails, Participants will be instructed to reply to the email and type the word **Stop** in the subject line to stop receiving the emails for that Activity. That is, users may opt to stop participating via email at any time and use the web-based interface instead.



The User Interface (UI) for email participation is text-based. All Activity participation screens are redesigned and optimized for text-based usage.

Ideas Activity

The Ideas Activity has two parts to the email. The top section contains all the ideas submitted at the time the email is sent. Participants comment on these ideas by adding a new line with the text of their comments under the idea. The bottom part of the email is the space for entering new ideas. Ideas and comments are separated by category and the Participant adds ideas by category.

Discussion Activity

The Discussion Activity allows Participants to comment on ideas by adding a new line with the text of their comments under the idea.

Organizer Activity

The Organizer Activity allows Participants to organize ideas into separate categories.

Categorize Activity

Categorize allows Participants to assign ideas to one or more categories.

Rate Activity

Participants are sent an email with the rating scale, rating scale descriptions, and a list of each idea to rate.

Rank Activity

The email interface for the Rank activity is similar to Rate except that Participants are asked to enter their order of preference regarding ideas.

Vote Activity

The Vote Activity presents Participants with the options of **Yes**, **No**, or **Abstain** for each idea.

Select Activity

The Select Activity is designed to allow Participants to quickly select a group of ideas from a large list. Ideas are presented with checkboxes next to them, and Session Leaders can set a range of selection.

Allocate Activity

The Allocate Activity is designed to enable Participants to allocate units of resources (dollars, points, hours) to ideas. Units can be allocated across all ideas, a range of ideas, or by category.

Score Activity

Score is a statistically powerful Activity for scoring alternatives according to weighted criteria.

Questionnaire Activity

The Questionnaire Activity is designed to enable Participants to answer a variety of questions and question-types. It is an extremely dynamic tool, which allows people who only have email access, not Internet access, to participate in the Activity. In the email itself, questions are listed with specific instructions as to how to respond, based on the question type.

Email-based participation will be available for Collabwrite and Table Activities in a future release.



Glossary of Terms

Action Plan

An Activity type in which selected items are scheduled and assigned to Participants or other individuals for completion.

Activity

A Tool that Session Participants engage in to generate new ideas, which they then discuss, organize, categorize, rank, rate, score, vote on, etc.

Activity Leader

An Activity Leader is an individual designated by a Session Leader to facilitate a particular Activity. The Activity Leader has Session Leader privileges with respect to his/her Activity's content.

Agenda

A set of Topics and Activities that compose a particular decision-making Session.

Agenda Designer

The view of an Agenda allowing the Session Leader the ability to add, modify, or delete Agenda topics and Activities.

Agenda Report Filter Support

Filter support for the entire Agenda allowing the Session or Activity Leader to build an Activity Report based only on the input of Participants who meet a particular set of criteria.

Agenda View

The view of an Agenda allowing Participants to access the Activities. By default Participants access an Agenda through Agenda View.

Allocate

An Activity Tool in which Participants associate or assign ideas to categories.

Anonymous Contributions

Ideas or comments in submitted to various Activities in which the author is not identified or revealed to the Group at large.

Categorize

An Activity Tool in which Participants place ideas into particular categories.

Clear Results

Ballot-type Activities, such as Rank, Rate, and Vote, contain a “Clear Results” button at the bottom of the screen. This allows the Session or Activity Leader to reset all results and reuse the Activity as many times as necessary.

Collabwrite

An Activity Tool for composing, modifying, and updating Microsoft Word-like formatted documents.

Group

A set of Participants who collaborate in a Session.

Group Leader

An individual who manages a Group’s settings.

Group Roster

A list of Participants in a Group.

Idea

An idea is an item submitted within an Ideas Activity for other Participants to consider and comment on.

Ideas

An Activity Tool in which Participants engage in electronic brainstorming. Participants submit new ideas or comment on those submitted.

Invitations

Email messages sent to a Roster of Participants inviting them to join a Session.

Logo Replace Function

A function allowing a Session Leader to replace the WebIQ circular motif found on the Agenda and Activities pages.

Participant

A user that is a member of a Group or Session Roster or who, for Open to the Public Sessions, has been invited to participate.

Pending Transfer

A Transfer not executed immediately, but rather invoked by a Session Leader on demand at a later time. See Transfer.

Pop-up

An item appearing quickly and temporarily when a particular key is pressed or a button clicked.

Presentation

An Activity Tool designed to present a file and or website to Participants. The Presentation Tool can also be used simply as a placeholder on the Agenda.

Questionnaire

An Activity Tool in which Participants are asked to respond to one or more questions.

Rank

An Activity Tool in which Participants sort ideas in order of preference.

Rate

An Activity Tool in which Participants evaluate items based on a predetermined scale.

Read Only

The ability to view an item, without being able to interact with it.

Reminders

Email messages sent to Session Participants reminding them to make contributions to the Session.

Score

An Activity Tool in which Participants score a set of alternatives against a set of weighted criteria.

Select

An Activity Tool in which Participants pick a set of choices from a list of items.

Session

A decision-making process consisting of an Agenda with Topics and Activities, in which Participants collaborate in order to reach a particular conclusion.

Session Leader

The Session Leader is the individual who creates the Session and corresponding Agenda, and facilitates the Session itself.

SMTP Transfer

Simple Mail Transfer Protocol allows a Group Administrator the ability to import a list of users from an organization's SMTP-compliant mail system to a Group Roster.

Stamps

In most Activity settings screens, checkboxes labeled **Show Date/Time stamps** and **Show ID stamps** can be found. These provide the submission date and time of an item, and a unique Participant identifier code. These stamps will appear next to the submitted item on the Activity screen and any subsequent Report screens.

Tables

An Activity Tool for brainstorming or otherwise entering data into a structured table format.

Template

A saved Session devoid of any data, which can be used to create a new Session and Agenda.

Topic

A heading under which a set of Activities are arranged within an Agenda.

Transfer

The feature allowing for the relocation of items from one Session or Activity to another.

Transfer Updates

Newly added items from a source Activity continue to be transferred to a destination Activity, after the original Transfer has been executed.

Vote

An Activity Tool in which Participants choose items by selecting “Yes,” “No,” or “Abstain.”