Start-Up Guide

OptionFinder® version 5.0

Option Technologies Interactive

The OptionFinder Software and the
OptionFinder Quick Start Guide

About Release 5.0

The core of OptionFinder for Windows is complete, replicating the capabilities of v4.2 onto a technology and development platform that will take us into the future. At the time of this release, in addition to replacing v4.2 in a 32-bit Windows technology, the framework is in place to support process and presentation enhancements with very little change to the user interface or data structures. You can look forward to updates approximately every six months as tantalizing process and presentation enhancements are added to the platform. Check our web site (www.OptionFinder.com) periodically for the availability of upgrades.

We invested heavily into the Help system and we hope you enjoy, as well as use it. Unless we missed a few, there is a “What’s This?” context-sensitive help for every control on every dialog. There is also a good index, table of contents, glossary and hypertext navigation system. This too will improve as the system evolves and we hear from our users.

About This Guide

Maybe you just received your OptionFinder system and need to use it before you get your training, or you want to learn the basics of OptionFinder on your own so you can concentrate on the advanced features when you get your OptionFinder training. Most likely though, you are an experienced user and want to learn OptionFinder 5 for Windows or just brush up, since it has been a while since you last used it. This guide takes you through setting up and running an imaginary meeting that requires using OptionFinder's often-used features and functions.

Here's the situation: Your boss just volunteered you to prepare and run OptionFinder as part of an important HR initiative. He said, "We need you to put together a series of workshops where our employees tell us about their working environment. And we need it to start next week, eight four-hour workshops in several cities over a two-week period. Our deliverable is a written and presented report to the board at their meeting in three weeks in Singapore. I told the president you could do it with OptionFinder, but that you would need some serious R&R when it is over. Here's the deal: plane tickets for two, and two weeks to get home. What do you say?"

Use this guide as the place to start. It leads you through the basics of building and running the OptionFinder-supported workshops required for two weeks of nirvana. Along the way you will be setting up many of OptionFinder's most used features. There is a short version of this Guide in the help system (pull down Help/Contents/Getting Started/Learning by Example) with links to relevant, related topics.

After working through this guide, you will still need to practice. This guide will not make you an expert, but it will show you what you need to know to get through those workshops over the next few weeks. It will also give you a head start towards becoming an expert is using the OptionFinder system.

A Shortcut for Experienced Operators

When OptionFinder was first installed, a template of the example workshops in this Guide was installed along with it. If you have not built any meetings yet, the agenda for this template meeting is the first screen to appear in OptionFinder after installation. If the software has been used and another meeting appears, you may retrieve the template meeting from the Favorite Templates user folder, accessible from the user folders in the OptionFinder Database (see page 9 of this guide).

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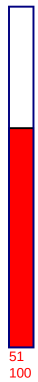
1. Overview of OptionFinder

Just what is OptionFinder? You might call it an electronic meeting system, or a group decision support system, or "groupware." Some people think of it as an audience response system, or an interactive keypad system. In simplest terms, you could say OptionFinder is an electronic polling device. But these words only scratch the surface of what OptionFinder can do.

At its simplest, OptionFinder is a combination of hand-held numeric keypads and computer software. It is a wireless electronic polling system used in meetings ranging in size from 5 to 2,000 people; each participant is given an OptionFinder keypad and can respond to polls presented on the "audience screen." With the OptionFinder software, the facilitator projects questions or statements onto an audience screen along with a set of responses from which the participants choose. Each participant pushes a number on his or her keypad corresponding to a response choice, and OptionFinder displays a graph of the response results. A graph may follow each question, or a whole set of graphs may follow a long series of questions, systematically analyzing opinion about something.

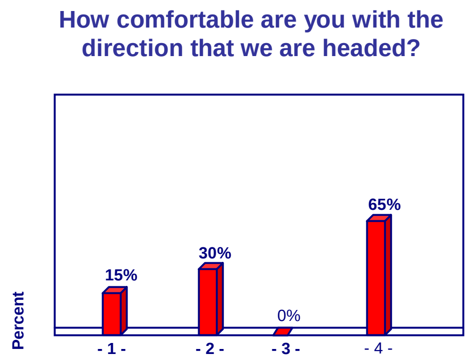
A simple example of an OptionFinder event is measuring the comfort level of the participants. First, OptionFinder displays the following polling screen:

How comfortable are you with the direction that we are headed?



1. Comfortable
2. Uncomfortable
3. …
4. Very Uncomfortable

When polling is completed, the graph below appears:



How OptionFinder is Organized

To understand how the OptionFinder is organized, you may find it helpful to think of the software program as a file cabinet containing several drawers. Within OptionFinder, a user folder is the equivalent of a file drawer and meeting folders are the equivalent of hanging files within those drawers. Meeting folders are "containers" holding the designs and data for OptionFinder meetings. Taken together, user and meeting folders make up the OptionFinder database.

Folders

Basically, user folders are just convenient places to store data for related meetings. They allow several users to share a system or one user to keep several styles (for example, a style specific to some foreign country, complete with native-language translations of all audience screens).

Meeting folders are containers for all the exercises and polling data from a particular meeting, focus group, workshop, or other OptionFinder-supported event. Meeting folders normally consist of an agenda and one or more exercise files.

Examples of User and Meeting Folders

- ***User folder*****:** *Pat Patterson.* Used to contain lots of meetings where Pat is the project leader.

- ***User folder*****:** *Favorite Templates.* Used to contain tried-and-true templates of exercise files, criteria scales, and the like.

- ***Meeting folder*****:** *Strategy Session 1998.* Used during the staff meeting to define our critical success factors for the 1998 calendar year. Includes OptionFinder exercises used to prioritize the factors and polling data collected.

- ***Master meeting folder*****:** *Work Climate.* Used to set up the employee workshops for our example workshops. In the master folder, you will define the exercises to be used in all sub-meetings. When polling data contained in the sub-meetings are consolidated into a single, inclusive data set, it is stored in the master folder.

- ***Sub-meeting folder*****:** Workshop folder used to actually run the exercises set up in the master meeting folder. The data for each sub-meeting (for example, *Tokyo, London, San Francisco*) is stored separately in its own sub-meeting folder.

Naming User Folders

If only one person is using the computer, then each of the user folders might be assigned names of the types of meetings being conducted or the client organization for which the meeting is being conducted. If more than one person is using the computer, then there will probably be a separate user folder for each person using the computer.

Exercise Files

OptionFinder exercises consist of a combination of polling questions, instructions for how the exercise is to behave when launched during a meeting, and polling data generated when the exercise is run in a live meeting. Several exercises are usually run to accomplish different purposes in a single OptionFinder-supported meeting. For example, one exercise may be used as a "warm-up" to familiarize participants with the equipment. Another may be used to collect opinions on a particular issue, while a third may be used to prioritize a list of something.

For example, to use OptionFinder to prioritize a team's list of "to do's," you would create a meeting folder with just one exercise design. The file for that exercise would contain the prioritizing exercise itself along with the polling data collected. It would be stored in the meeting folder, which, in turn, would be stored in the user folder.

Other OptionFinder Components

In addition to folders and exercises, OptionFinder includes the following major components:

- ***OptionFinder database,*** in which you can create your user and meeting folders. The database dialog is also where you "manage" your folders (for example, back up, delete, compress, etc.).

- ***Design tools,*** where you can design and customize polling exercises. The design tools include List Processing (for dealing with list of things), Questions (for asking multiple choice-type questions), Groups (enabling slicing and dicing data by subgroups of the audience), and a Participant Roster (if you don't want anonymous participants).

- ***Agendas,*** where you can design and run almost any meeting from an audience-quality screen. Agendas are a special kind of OptionFinder tool; they serve to organize meeting events during the design phase, and as a "launch platform" for running OptionFinder events during the actual meeting.

- ***OptionFinder desktop,*** where Windows "power users" can open lots of exercise files and windows, iconize them, tile them, etc.

- ***Graphs,*** of data to show polling results to your audience. These graphs are generally simple presentations of the results, but you have the ability to show the data in several different ways via HotKeys.

- ***Reports,*** through which you can print reports of response data, or export results in spreadsheet-compatible format.

OptionFinder Building Blocks

It helps to think of OptionFinder as a set of exercises in which each accomplishes a certain outcome for your audience. If you use OptionFinder much, you will find yourself using the same methods repeatedly to accomplish similar outcomes; thus the software is designed around a system of templates to make it easy for you to reuse, instead of redesign. For example, you can save choices for questions (such as Yes / No / Maybe) as templates, or you can save the whole question. Or you can template an entire exercise (for example, a tried-and-true series of questions to "warm up" your audience). Or you can save an entire meeting as a template.

Similarly, when you design an OptionFinder-supported meeting, the activities consist of building blocks too. For example, your meeting may have three OptionFinder exercises in it. Each exercise consists of polling questions, response choices, and instructions for how the exercise is to behave. The exercises are organized into an agenda to make it easy to work with them both when you are designing and testing them, and when you are running them at Showtime.

The OptionFinder Agenda

By far, the easiest way to use OptionFinder is to organize the exercises and other design files you intend to use into an agenda, one of the primary OptionFinder tools. From an agenda you can easily: build exercise files, attach exercises to agenda topics from which they can be "launched" (that is, run the exercise according to the script specified in its behaviors), or display polling data from previously polled exercises. Most operators will set their systems to automatically load the last-used agenda in the last-used meeting folder when OptionFinder is first started.

Try OptionFinder's help system. Find out more about how it starts up by pulling down */Help /Contents*, then click the *Index* tab and type "startup preferences" and select "configuring startup preferences." This brings up the help topic regarding start up preferences. In addition to reading about start up preferences, click the *See also* icon to learn more about related topics.

First Steps for Setting Up a New Meeting

This guide is organized around an example meeting, with a typical use of each of the tools. Each task you are instructed to do was selected to show you how to do something new or to rehearse needed skills.

You do not have to go through the meeting exercises in the order they are presented here, but you do need to get the agenda set up first. Throughout the software, you can access the on-line help system. Either press <F1> for context sensitive help or pull down the Help menu and select the type of help you need. The steps you go through to set up a new OptionFinder meeting are straightforward:

1. ***Select a user folder (or add a new one) to hold the meeting folder.***

2. ***Add a meeting folder to hold designs and polling data.***

3. ***Create an agenda to organize the exercises and to launch them at Showtime, when your audience is present.***

4. ***Add agenda topics laying out the activities and sequence of the meeting.***

5. ***For each agenda topic involving polling, create an exercise (design) file containing the questions and behaviors defining how the exercise will work.***
   You will need to select which OptionFinder tool (Questions, Groups, or List Processing) is most appropriate for the exercise.

6. ***Switch the source of incoming response data to simulate audience responses and test the designs to make sure they work the way you want them to.***
   Then fine tune as necessary.

7. ***Switch to Showtime screen mode and rehearse the design the way your audience will see it, without the tool bars and menus of the Windows user interface.***

8. ***Purge the test data and test some more.***

9. ***Set up your keypad system, switch the source of data to keypads, and test the design in Showtime mode.***

10. ***If it is available, set up your computer projector system and test it too.***

2. Creating a Sample Meeting

Here's the situation: Your boss just volunteered you to prepare and run as part of an important HR initiative. He said, "We need you to put together a series of workshops where our employees tell us about their working environment. And we need it to start next week, eight four-hour workshops in different cities over a two - week period. Our deliverable is a written and presented report to the board at their meeting in three weeks in Singapore."

Creating Folders and Agendas

Before we can begin creating the actual exercises that will make up our meeting, we must first create a user folder and within it we will need a meeting folder to hold those exercises.

Start OptionFinder

If you have not already done so, start the software by pressing the Windows Start button and selecting Programs /OptionFinder /OptionFinder 5.

Create a User Folder

Your first task is to create a user folder to hold the meeting folders and exercise files you will generate as you go through this guide. Later you can delete this user folder if you wish without affecting any real meeting information.

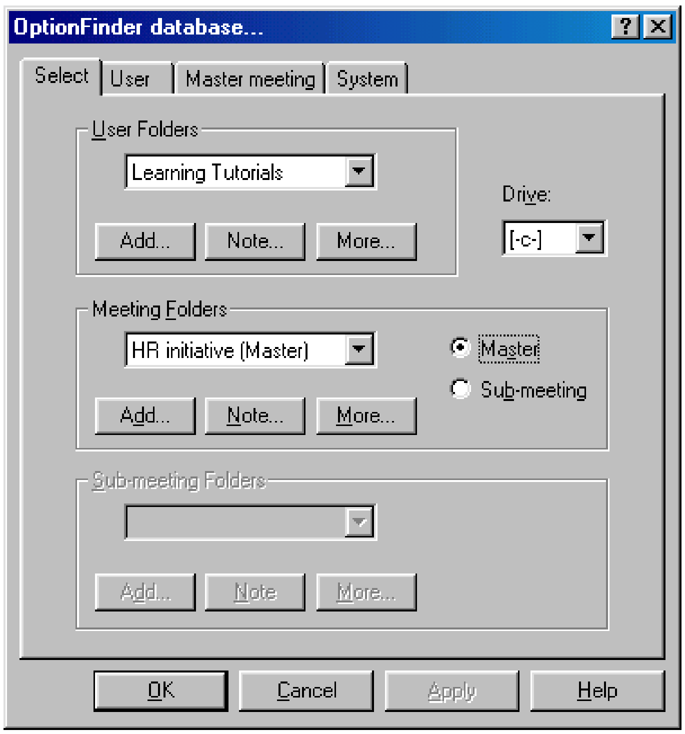
1. ***If it is not already showing, bring up the OptionFinder database dialog by selecting the File pulldown menu option Go to OptionFinder Database or by clicking the file cabinet icon.***

2. ***At the Select tab, add a user folder for your learning sessions by clicking the Add button for user folders. This produces the Add a new User folder dialog.***

3. ***Give the new user folder a name, something like "My Learning," and click OK. Your new user folder now appears on the list of user folders on the Select tab of the database dialog.***

Note: You may use a maximum of nineteen characters for the names of most items in OptionFinder.

The following graphic shows the main tab of the database dialog where you select the meeting you want to open (or add a new one). It is available anywhere in OptionFinder by selecting the File pulldown menu option Go to OptionFinder Database.



Experimenting with the Online Help System

In any OptionFinder dialog, you can get help by clicking on a control, pressing <F1>, or clicking the "What's This?" icon on the title bar (the question mark), then clicking on a control. (A control is any selection on a dialog that directs how OptionFinder will work. Examples of controls on this dialog are Add, More, Master, and Sub-meeting.) This is what is called "context-sensitive help" and it is available for every control on every dialog in OptionFinder. Use it to find out what a control does.

Next click the Help button on the dialog and see what information it provides. This "button help" provides information about the function of the dialog as a whole, with links to the help for each of its controls. Some help screens have links to other related help topics. To access these links click on the title of the help screen.

Create a Meeting Folder

In this section, you will create a meeting folder to hold exercise files you will generate as you go through this guide. For this example, since you are creating a meeting model that will be replicated in several locations, you will create a "Master" meeting folder. It will contain all exercises to be used in each "sub-meeting" location; this way, you will create the exercises only once, then run the same exercises each time you conduct a sub-meeting.

1. ***Make sure the user folder you want to work in is selected.***

2. ***Add a meeting folder for this learning session by clicking the Add button for meeting folders.***

   This produces the *Add a new Meeting to <user folder name>* dialog.

   While you are looking at the Add a new meeting dialog, notice the other ways you can add a new meeting folder to the system (Get a template, Restore a backup, or Copy an existing folder).

3. ***Give the new meeting folder a name.***

   For example, use something like "HR Initiative."

4. ***Since this is to be a master meeting (for controlling several sub-meetings), check the Master control.***

   To create a regular meeting (one without sub-meetings), follow the same procedure, but do not check the *Master* control.

5. ***Check the dialog for accuracy, and then click OK.***

   Your new meeting folder now appears in the list of Meeting Folders on the Select tab of the database dialog. Since you added a Master meeting, OptionFinder has appended *(Master)* to the name you gave the meeting.

Open the Meeting Folder You Want to Work In

Next we will open the master meeting folder where you will create the OptionFinder exercises to be used in the workshops.

1. ***Select the user and meeting folders we just created, click the Master control, and click OK.***

   The confirm intention dialog "No agenda was created for this Meeting. Do you want to create one now?" appears.

2. ***Click <Yes> to confirm your intention.***

   Notice the user and meeting folders you are working in are always indicated on the status bar at the bottom of the screen.

Create an Agenda

In this section you will create an agenda for the workshops. While doing so, you will also be instructed to try several features of OptionFinder to acquaint you generally with the interface.

1. ***Open a meeting folder.***

   When you open a meeting, the first screen you come to will depend on how your start-up preferences are set. For new meetings you will most likely come to a blank OptionFinder agenda. However, you could end up at the OptionFinder "desktop" (a blank looking screen with icons across the top). This is the main playground for Windows power users who are also expert OptionFinder designers, since they can open many windows, iconize them onto the workspace, tile the windows, etc.

   For most users the agenda is the main interface for using OptionFinder and you will rarely even see the desktop. Think of the agenda tool as a "home base." In fact, pressing the <Ctrl+Home> HotKey brings up your agenda.

2. ***If an agenda is not the screen showing, click the Agenda icon on the tool bar (a big red "A") or press <Ctrl+Home> to open a blank agenda.***

   If you have already created an agenda, it will be opened.

   Hint: If your agenda does not come up, make sure you are pressing <Ctrl+Home> and not <Ctrl+H>.

Edit the Title of the Agenda

Now you will want to give the agenda a meaningful title. This section will also help you become acquainted with what you have to do to edit anything in OptionFinder.

1. ***Change the default title by double clicking the title area where "Agenda" appears (or press the <Ctrl+E> HotKey) and type "Work Climate Initiative".***

This produces a WYSIWYG ("what you see is what you get") editing screen where you can change the title. A good title for the audience to see is "Work Climate Initiative."

This is a good place try OptionFinder's editor to see how it works and what its capabilities are. For example, you can change the font size or color of a word or phrase, and you can bold, underline, or italicize any of the characters. Be aware, though, that when you make changes in the font size or color, you are setting a specific parameter that will not be overridden if you later decide to make changes in the overall "meeting look and feel" of the audience screens for the meeting.

As an example, let's say you decide to change the color of a word to red. Later you decide to change the background of the meeting screens to blue so that they all have white letters and blue backgrounds. Since the overall meeting look and feel does not override the individual changes that you have made in the editor, you will now have a red word on a blue background, making the word hard to read. We suggest that you use bold, underline, or italics to provide emphasis instead of color.

2. ***Test the emphasis on the first word in your agenda title by highlighting the word and clicking on the "B," "I" or "U" icons.***

   To remove the emphasis, highlight the word again and click on the same icon as before.

3. ***Add the same emphases again, but this time use <Ctrl+B> HotKey to bold, <Ctrl+U> to underline, and <Ctrl+I> to italicize.***

   We strongly suggest you learn the HotKeys for all functions you may need to use when your audience is watching. HotKeys allow you to perform editing and highlighting tasks more smoothly and rapidly than do the menus.

   If you want to add a second line to your agenda title, move your cursor to the end of the first line and press <Shift+Enter>.

   If you want to make the second line smaller than the first, highlight the content of the second line, click on the font control and select the size of font that you want.

4. ***When you have finished editing the agenda title, click the Save & Close Current Window icon on the tool bar or press the <F2> HotKey.***

   The <F2> HotKey always saves and closes the current window. It is one you will use often.

Create Some Text Variables

Because this is a Master meeting that will control all the workshops, the city and date will have to change for each of the workshops. To make this easier, instead of changing the agenda title for each city and date, you will want to use OptionFinder's text variables to adapt the workshops more easily.

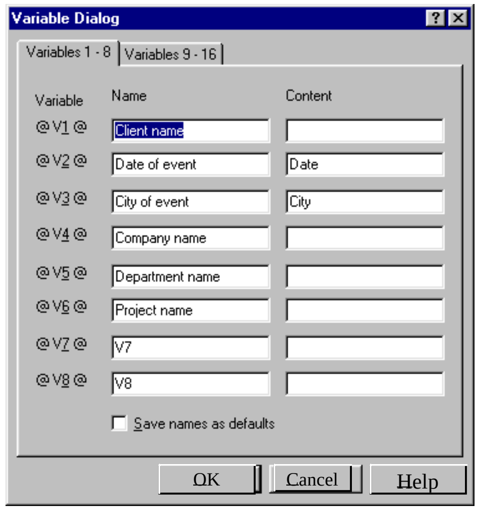
1. ***Double click on the agenda title to edit it again.***

2. ***Move your cursor to the end of the first line and press <Shift+Enter> to enter a second line of text. Type @V3@.***

3. ***Press <Shift+Enter> again and on the third line, type @V2@. Press <Enter>.***

   If you want to make the text on the second and third lines smaller than the text on first, highlight the content of both lines, click on the font control and select the size of font that you want.

4. ***Select the Meeting pulldown menu option Variables /Define Variables to bring up the Variables dialog.***



When you installed OptionFinder, defaults for the first six variables were created. Variable @V3@ is the city name of the event and @V2@ is the date. Try the help for this dialog to learn more.

Use the *Meeting* pulldown menu again and use your mouse or <Up arrow> or <Down arrow> keys to highlight different menu choices. Notice the short help on the prompt line at the bottom of the screen. It tells you generally what a menu selection does and what, if any, HotKey will do the same thing.

5. ***Type in "London" for variable V3 and a date for variable V2.***

6. ***Click OK to close the dialog.***

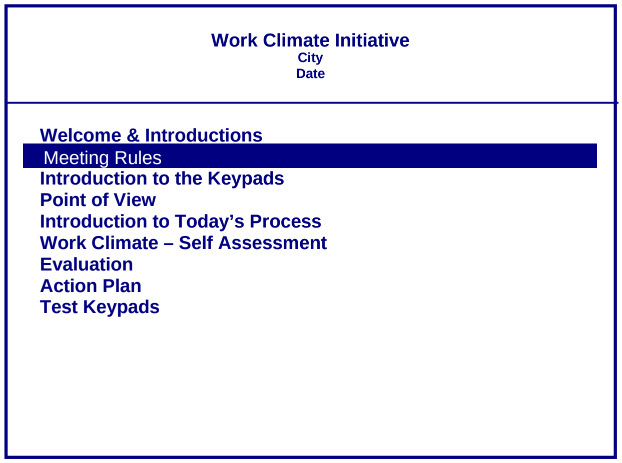
7. ***Press <F2> to save changes to the Agenda title.***

Add Agenda Topics

Now you need to create agenda topics for each of the workshop activities OptionFinder will be supporting. You are going to create the HR initiative workshops in which participants conduct a self-assessment of their company's work climate. The outcome you are after is an accurate and in-depth assessment of what it is really like out there. Here are the agenda steps and polling exercises you will be going through, along with the OptionFinder polling tools that will do the job.

Agenda Topic	Tool
Welcome & Introductions. This is where we will get to know each other a little and set expectations for the meeting.	***Agenda Topic Note***
Meeting Rules. This will be a "code of behavior" for the meeting. Participants can add rules they feel are necessary.	***List Processing tool, but no polling***
Introduction to the Keypads Create a "Warm up" exercise to break the ice, demystify the keypad system, and teach the audience how to use their keypads.	***Question Tool***
Point of View Collect information from participants so OptionFinder knows what department they come from and the length of time they have been there. We want to use this data to find out how participants respond to other questions according to department membership and length of service.	***Groups Tool***
Introduction to Today's Process Ask a couple of questions about the organization's communication to get things rolling and to introduce the process.	***List Processing Tool***
Work Climate - Self-Assessment. Run through a list of statements about work climate, judging the statements on a scale of how well the statement describes their own experience in the company. Then run through the list again, this time asking whether things are getting better or worse around each statement in the list.	***List Processing Tool***
Evaluation Evaluate the quality of the information collected in the meeting.	***Question Tool***
Test Keypads This is last because your audience won't be using it, but it is useful for making sure the keypads work properly (before the audience shows up).	***Question Tool***

Here's the agenda we will want to have when we are done.



Let's get started!

1. ***Add the first agenda topic by clicking the right-mouse button to bring up the short pop-up menu and then selecting New Agenda Topic.***

   You can add a new agenda topic via a HotKey, but we want you to get into the habit of using the right mouse menu available in all audience screens. If you forget a HotKey when you are running live with an audience watching, the right-mouse pop-up menu will refresh your memory without forcing you to switch into Design mode. In fact, the right-mouse menu looks OK to an audience. (It looks like you know what you are doing, not that you forgot the HotKey.)

2. ***At the Agenda Topic Editor type "Welcome & Introductions." Then click the Save and Close Current Window icon or press the <F2> HotKey to save it to the agenda.***

3. ***Using the same procedure (right click, select New Agenda Topic, type the topic name, and press <F2> to save the topic), add the rest of the***

agenda topics.

The topics you want to create are "Meeting Rules," "Introduction to the Keypads," "Point of View," "Introduction to Today's Process," "Work Climate - Self Assessment," "Evaluation," and "Test Keypads."

Adjust the Look of the Audience Screens

Now we will change what the audience actually sees on the screen. This is called "Look & Feel" in OptionFinder and you generally want to keep it as consistent as possible throughout your meeting.

1. ***Switch to Showtime mode to display the agenda the way the audience will see it (<Ctrl+M> HotKey).***

   This removes as much of the usual Windows interface as specified in the Define Showtime screen mode dialog. (You can bring up the dialog for defining Showtime mode via the <Ctrl+Shift+M> HotKey.)

   Press <Ctrl+M> to switch back to Design mode, and then again back to Showtime.

   Remember, your audience does not want to see all of the "noise" of the Windows interface. So, when you practice you should be in Showtime mode.

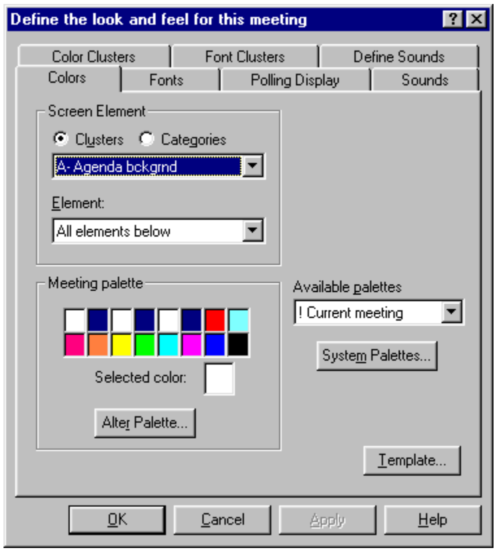
2. ***Move a topic up or down on the agenda (<Ctrl+Up arrow> or <Ctrl+Down arrow> HotKeys).***

3. ***Change the size of the fonts for all topics on the agenda (<Alt+>> and <Alt+<> HotKeys).***

   These HotKeys are always available to make adjustments at Showtime and are used often. Practice with them until you are familiar with how they work.

4. ***Switch back to Design mode, then select the Meeting pulldown menu option Meeting Look & Feel.***

The dialog for setting general look and feel parameters for the whole meeting appears. Here is one of the tabs for defining the look and feel for the audience screen. It is always available through the Meeting pulldown menu option Meeting Look & Feel.



5. ***Change the color of the audience screens from "Blue on White" to "White on Blue."***

   To do this, select "White on Blue" from the *Available pallets* list to change the overall color scheme for the meeting.

6. ***Click OK to apply the new color scheme.***

   OptionFinder installs with several good color palettes. If you want to create your own color scheme, go to the index of the help system and select "look & feel, configuring for meetings."

Before you leave, notice the other things you can change: Font face, Counters and Timers showing during polling, and Sounds indicating progression during polling.

Give the Agenda File a Name

In this section you are giving the agenda file you just created a name. In OptionFinder you do not have to name your files (they can remain "untitled"), but it is generally a good idea to name them anyway so you can understand what they are later.

1. ***Select the File pulldown menu option Save As. to bring up the Save As dialog.***

2. Give the agenda the name "Work Climate" and click OK.

3. Creating Meeting Exercises

In this chapter, you will be creating the OptionFinder exercises to support each of the agenda topics you created.

Creating an Ice Breaker Exercise

In this section you will create some icebreaker questions to get your meeting started and familiarize your audience with the OptionFinder system.

1. ***Double click the "Introduction to the Keypads" agenda topic, and then click the New Tool button.***

2. ***Select Question Exercise and click OK.***

   This brings up the pick list for questions.

3. ***At the Questions Pick List, right click and select New Question, or click the New Question icon.***

   The *Question Type* dialog appears.

   Use the "What's this?" icon (?) for definitions of Key Label and Maxkey. We are going to build icebreaker questions with a fixed set of responses.

   The *Question Editor* screen now appears and you can start typing the first question.

4. ***Click the key label control and click OK.***

5. ***Type, "Did you ever lie to your mother?" and press <Enter>.***

6. ***Type the first response choice "Yes" and press <Enter>.***

7. ***Create two more response choices.***

Use the following for this example: "No" and "Well, I wouldn't call it a lie exactly."

8. ***Right click and select Label Graphs to go to the graph label editing screen.***

The first time you bring up this screen, OptionFinder feeds in the first few characters from each response choice below the bar representing that choice. You may edit these labels so they make sense to you.

9. ***Press <Tab> and <Shift+Tab> to navigate between labels.***

10. ***Press <F2> to save and return to the Question Editor screen.***

11. ***Press <F2>, give the question the name "Mom", and click OK.***

OptionFinder will ask you for a name for any unnamed exercise each time you "Save & Close" (via <F2>, icon, or menus). You don't have to name exercise files, but it is a good idea and the bothersome *Save As* dialog quits popping up.

When you are attaching exercises to agenda topics previously created, OptionFinder has some "housekeeping" to do and may ask you some questions to clarify your intentions.

12. ***Repeat these steps to create another question.***

For this example, use the stem "Have you ever driven more than 30 m.p.h. over the speed limit?" and with "Yes" and "No" as the response choices. Make sure you label your graphs.

13. ***Press <F2> to save and give the question a name: "Speeding." Click OK.***

14. ***Press <F2> again and give the entire question exercise a name: "Icebreaker."***

15. ***Click OK.***

    You should now be back at your agenda.

Test the Exercise

In this section, you will simulate polling the exercise you just added to your meeting to make sure it works properly. You don't need to set up the keypads for testing. If your test works via simulations (either computer generated or through the keyboard), and then later your keypad system works generally, you don't actually have to test the keypads for each individual exercise.

1. ***Change the Source of Data to Simulate by pulling down the Meeting menu and selecting Source of Data /Simulate.***

   Notice that "Simulate" shows on the right side of the status line at the bottom of the screen.

2. ***Switch to Showtime mode (<Ctrl+M>) so things will appear as your audience will see them.***

3. ***Highlight the agenda topic "Introduction to the keypads," then press the <F10> HotKey to launch the warm-up exercise.***

   A confirm intention dialog "You are about to commence polling in the master meeting" will pop up. Since we are only testing our exercises and not entering valid data, click <Yes>.

4. ***Take a close look at the question itself to make sure it is what you want to present.***

   You can ignore the colors, font face, response graphic, and counter for now since meeting-wide look and feel parameters like these can be changed all at once. However, you should be thinking about how you would like the polling screen to appear.

5. ***Generate some data through one of the following methods.***

- Press <R> to generate random responses.

  This will immediately bring up a frequency distribution graph of the data, since the system defaults for sequence behaviors are set to show graphs after each question.

- Press <L> to generate responses skewed to the low end of the scale.

- Press <H> to skew to the high end.

- Press <S> to split between highs and lows. Be sure to give some factors high and some low marks.

Here are some things to think about as you look at your data: Is the question really what you want to ask? How will you facilitate once the graphs are up? Are the graphs what you want and did they appear when you wanted? This kind of mental rehearsal as you are creating and testing exercises improves the exercise and prepares you for the live meeting.

6. ***Press the <F10> HotKey successively to continue the sequence.***

   Once the exercise has run to completion (in this case, finished its two questions), pressing <F10> again returns you to the agenda. Observe how the <F10> HotKey works. At the agenda, it launches the exercise, goes to the next scripted event in the exercise, and when there are no more events in the exercise it returns to the agenda.

Note the sequence you just went through:

1. ***Create an agenda topic.***
2. ***Create a design to support it.***
3. ***Return to the agenda, and launch it to ensure it is working properly.***
4. ***Mentally rehearse facilitating your audience through the exercise.***

This is a sure-fire method for creating exercises that work the way you want them to. If you find something not quite right, fix it and run the test again.

Purge Polling Data

You should now erase the test polling data so you can test again.

1. ***Switch to Design mode.***

2. ***Purge the test data from the icebreaker exercise by highlighting the agenda topic, then selecting the File pulldown menu option Purge Data/Purge Current Topic Data.***

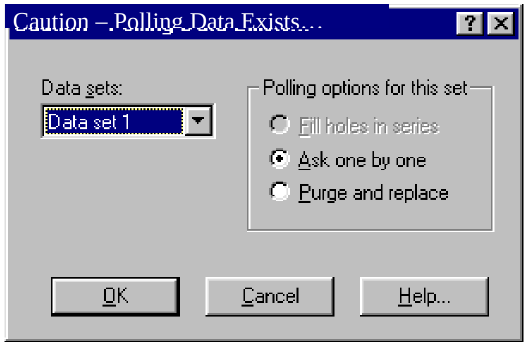
   OptionFinder will give you warnings before purging the data. You should get in the habit of reading these warnings if any real data has been collected in the meeting so you don't inadvertently purge important data.

   Caution: You cannot recover purged data. Never purge data collected from a real audience unless you have backed it up first.

Where Response Data is Stored and When to Purge It

As soon as the last response is given to a particular question and OptionFinder has advanced to the next event, the response data is automatically saved to your computer's disk drive. You do not have to manually save response data. The data is stored with the design file holding the particular OptionFinder exercise you just ran.

If you do not purge test data and decide to run the same exercise again, OptionFinder will produce a dialog where you are asked what to do with the existing response data. If you get this dialog by mistake, pressing <Esc> or the Cancel button will take you back with no harm done. If the data is test data, choose "Purge and Replace." OptionFinder will give you a warning that you are about to destroy data and ask you to confirm that you want to proceed with the purge. Answer "yes" and OptionFinder will purge the response data and bring up the first polling screen in the exercise.



This dialog automatically appears if you try to poll an exercise that has already been run. If one or more questions in the exercise have not been polled, another choice will be available: "Fills holes in series."

Purge Data from a Single Polling Exercise

These are the steps to take if you want to purge data from a polling exercise before you run it again.

1. ***Highlight the agenda topic from which you want to purge data.***

2. ***Select the File pulldown menu option Purge Data /Purge current topic data.***

   This will delete the polling data in the exercise linked to this agenda topic, not the exercise itself.

3. ***Follow the dialogs, paying attention to the warnings.***

   Read the warning messages carefully to make sure you have the correct file highlighted. When you have more than one design file, it is easy to highlight the wrong one and start the purge procedure. Always double check the file name before you answer, "Yes" to the warning messages! OptionFinder will give you at least two warnings before purging.

Purge Data from the Whole Agenda

These are the steps to take if you want to purge data from all exercises attached to the agenda.

1. ***On the File menu, point to Purge Data, and click Purge all Poll data (This Agenda). Or click on the Purge Current Agenda icon.***

2. ***Follow the dialogs, paying close attention to the warnings.***

Practice Functions Available When Polling is Underway

There are several important functions available while polling is underway.

1. From the Meeting menu, change the Source of Data to your computer's keyboard.

2. ***Launch the "Ice Breaker" exercise again.***

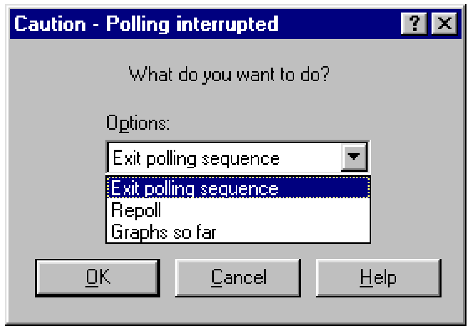
3. ***Use the number keys on your keyboard to enter response data from 10 participants.***

4. ***Complete each of the functions described in the following sections.***

Interrupt the Polling Sequence

Many times, the unexpected happens and you need to stop the polling sequence in order to do something else. If you do stop an exercise series without completing it, you can start it again where you left off.

1. ***While polling is underway, press the <Esc> HotKey.***



This dialog appears when you press <Esc> when polling is underway. OptionFinder will always require you to confirm your intention to stop in the middle of polling an exercise.

Try interrupting the sequence via the <Ctrl+Home> HotKey to take you back to the agenda before completing the exercise.

2. ***At the confirm intention dialog, keep the selection set to "Exit polling sequence" and check the box to Keep data for this poll.***

   Now you have completed the first question, but not the second.

3. ***Launch the exercise again and follow the prompts to continue this question series.***

   Use help on the dialogs if you need to.

4. ***Purge test polling data***.

Reset Responses for the Current Question

Quite often you will want to zero out responses to a poll and reset the timer. Even though the next response from a participant replaces an earlier one, it seems to give audiences comfort to see things reset and starting over.

1. ***Launch the "Icebreaker" exercise again.***

2. ***Key in some responses to the first question.***

3. ***Press <Delete> to zero out the responses so far and begin polling again.***

Before moving on, spend some time looking at the menus to see what you can do during polling. Remember that many functions are available by clicking the right-mouse button.

4. ***Enter a few responses for this question and press <F10>.***

Reduce the Number of Keypads OptionFinder Looks For

During polling, OptionFinder looks for the number of keypads defined in the *Define Keypad System* dialog (*Meeting/Keypads /Define Keypads*). For example, you may think 20 participants are attending, so you define the keypads you will be using as addresses 1-20. At Showtime, you find only 15 people showed up, so you will want to reduce the keypads to the 15 they are using.

1. ***Key in 15 responses on the next question.***

2. ***Press the <-> (minus) HotKey to tell OptionFinder to only look for these 15 keypads (participants) that have responded***.

   On the next question you ask (even in a new exercise), only responses from these 15 keypads will be expected.

   Of course, as soon as you do this, the 16th person shows up. To reverse the process and look for all keypads again, just press the <+> (plus) HotKey during polling. Press <-> (minus) again when all 16 responses have been entered.

Hide the Screen Temporarily

You will encounter times when you want to temporarily blank out the audience screen, such as when audience members are talking.

1. ***Press the <Ctrl+H> HotKey to hide the audience screen.***

2. ***Press any key to show it again.***

3. ***Return to your agenda.***

Creating Demographic Categories for "Slicing" Response Data

You want to keep track of data broken down by participants' departments and how long they have been with the company, so you will use the Groups tool. The procedure for creating grouping questions is identical to the procedure for creating questions in the Questions tool.

1. ***Double click the "Point of view" agenda topic and then click the New Tool button.***

2. ***Select the Groups file and click OK.***

   This brings up the *Groups Pick List*.

3. ***Right click and select New Group.***

4. ***Select the Mutually Exclusive grouping logic method to add a grouping dimension. Click OK.***

   This brings up an editing screen where you create the subgroups from which the participants will make their choice.

5. ***Change the default question stem to "What is your department?" Then press <Enter> to bring the cursor to the choices area of the screen.***

   Try the <Ctrl+Del> HotKey as a quick way to delete the default question stem. This HotKey deletes everything in the current component of any editor screen. Sometimes it deletes more than you think, so be careful.

6. ***Type in the first subgroup "Sales & Marketing" and press <Enter>.***

7. ***Create three more subgroup categories: "R&D," "Manufacturing," and "Support Administration."***

8. ***Press <Tab> to move to the bottom portion of the screen and type in an orienting prompt: "Your department is where your paycheck comes from."***

9. ***Right click and select Label Graphs or press the <Ctrl+L> HotKey to go to the graph label editing screen.***

   Edit these labels so they make sense to you.

10. ***Press <F2> to save the graph labels.***

11. ***Press <F2> and give the grouping dimension a name: "Department." Click OK.***

    This label will be used to identify what subgroup's data is being displayed in the graphs, so your audience will see it.

12. ***Create a second grouping dimension to determine how long they have been with the company.***

    Use the following subgroups: "Less than 2 years," "2-5 years," "6-10 years," and "More than 10 years."

13. ***Edit and save the graph labels.***

14. ***Press <F2> and name the grouping dimension something like "Tenure with the company."***

    Remember, it will show up on the graphs at Showtime.

15. ***At the Groups Pick List, press <F2> to save the whole grouping exercise, and then name the exercise.***

We typically name the group design file "All Groups" or "Groups" into which we place ALL of the grouping dimensions. You cannot have more than one group exercise file in your meeting.

Press <F2> to return to the agenda.

16. ***Launch the exercise and enter some response data.***

    After you have collected data for both questions, navigate between the graphs in the design file either by pressing the <left arrow> or <right arrow> keys or by pressing the <letter> key which corresponds with the item you wish to view. (For example, the first item polled will be A, the second item will be B, etc.)

    Notice the results are defaulting to percentages in each group. Toggle back and forth between percents and counts via the <F7> HotKey.

17. ***Return to the agenda.***

Creating a List Processing Exercise to Get Things Rolling

Since every survey comes up with communications as a hot issue, you are going to use it to introduce your main process. So you need to create a couple of questions about communication.

1. ***Double click the "Introduction to Today's Process" agenda topic, and then click the New Tool button to create a new exercise.***

2. ***Choose the List Processing Exercise and click OK to get to The List.***

3. ***Press <Insert> and enter the first "item" in the list: "I understand our company strategy."***

4. ***Press <Enter> or <F2> to save the first list item.***

5. ***Enter a second item: "I see a clear relationship between my department's priorities and our company strategy." Press <Enter>.***

Notice the list items are normally identified with letters. The reasoning behind the default of identifying items in the list by letters is to allow more HotKeys to navigate among the graphs. For example, you can navigate through a list of 26 items simply by pressing the corresponding letter from A to Z.

The purpose of allowing numbers is that sometimes an agenda or list is submitted to the OptionFinder operator already created with numbers or, as in this case, a list is being created without the need for identifiers at all. If you do use the numbers on a list that will be polled, you will need to make your own "key" map telling which number equals which letter (for example, "1" = A; "10" = J; and "18" = R) so that you can navigate quickly in front of the group using the letter keys.

If you wish to change the way items are identified right click Behaviors/The List Behaviors or click the List Behaviors icon and change the Item identification style to "Numbers."

6. ***Right click and select Go to Criteria Pick List to switch to the screen from which you can create the criteria your audience will use to judge these statements. Using the same general steps you used to create your grouping dimensions, create two criteria.***

7. ***Select Key Label at the Criterion Method dialog box.***

   Use "What's This?" help to see what the other choices are.

8. ***For the first criterion, create some choices:***
   1. *This is not us at all.*
   2. *This fits us some of the time.*
   3. *This fits most of the time.*
   4. *This describes us quite well.*

9. ***Add an orienting prompt "In your experience, how well does this statement describe us?"***

10. ***Create your graph labels and give the criterion a name such as "Our Performance."***

11. ***Create a second criterion with these choices:***
    1. *We are actually getting worse.*
    2. *We are staying about the same.*
    3. *We are improving."*

12. ***Add an orienting prompt "Over the past year how have we changed?"***

13. ***Create your graph labels and name the criterion "Direction."***

14. ***Save and name the exercise "communication." Return to the agenda.***

15. ***Launch the exercise and enter response data for all questions. Observe the way the exercise behaves, noting anything you want to change.***

Navigate the Graph

So far you have just been bringing up the graphs in a simple way. However, you should think of everything you do in order to show graphs of polling data to your participants. It is the graphs themselves that stimulate discussion and you will need to switch to the most effective view of the data to accomplish the best possible discussion. In this section, you will use the menus and HotKeys to navigate among the many graph views. You should plan on mastering OptionFinder's HotKeys for these functions because your audience will always be looking on as you bring up the best view.

1. ***Bring up the graphs by highlighting the agenda topic and pressing <F9>.***

   Since you have data for two criteria, you can display responses to each one individually or to both together.

   For help on what a graph means and what you can do there, press <Shift+F1>. The Help HotKey is <Shift+F1> in the graphs since the <F1> HotKey is used to bring up a particular view of the data (as do <F2>, <F3>, and <F4>).

2. ***Right click and select Change Criteria View/Horizontal Axis to pull up the F1 Averages graph for the Communication criterion.***

3. ***Press <item letter> keys (A or B) to focus in on responses to that item.***

   It takes a little time and practice to move fluidly among the graph types. However, in most exercises you will only need to know a few HotKeys since you never want to show your audience all the views.

Slice the Data by Subgroup

In this section, you will be displaying polling data to highlight differences (or similarities) among the subgroups in your audience. There are two ways to display subgroup information:

- Show the data for just one subgroup.
- Show averages for all subgroups to illustrate similarities or differences.

The following instructions show how to do the latter:

1. ***From the Averages graph, press the <Ctrl+G> HotKey to bring up the Group Behaviors dialog.***

2. ***Highlight either "Tenure with company" or "Department" and click OK.***

   Notice the title for the group dimension you selected now appears on the right vertical axis of your graph.

3. ***Press the <F4> HotKey to bring up the subgroup comparisons.***

   The bar for “All” represents the average response for the entire audience. The remaining bars represent the average response for participants in the corresponding subgroups.

4. ***Press <F1> to return to the overall averages graph.***

5. ***Press the <1>, <2>, <3>, and <4> keys to view a single subgroup’s average response to all items on this graph. (Note the label on the right vertical axis changes as you switch subgroup views.) Press <0> to get back to everybody. Press <Ctrl+G> to change to the other grouping dimension.***

6. ***Test these views for a while until you see how the <Letter>, <Number> and <F1>, <F2>, <F3>, & <F4> HotKeys work to smoothly navigate among complex data.***

Adjust the Behaviors for the List Processing Exercise

Behaviors are the controls that determine how and when the questions should be asked, how and when the responses to questions should be displayed, and what the overall look and feel for your exercise (meeting) will be.

If the default template has not been changed since OptionFinder was installed, you are seeing the most commonly used behavior settings, since you didn't change any behaviors when you created the exercise. Notice that all the exercises you created behaved close to the way you wanted them to without your having to adjust anything. However, for purposes of furthering your OptionFinder education, you will make some changes anyway.

1. ***From the Agenda, highlight the "Introduction to Today's Process" agenda topic, right click and select Go to Linked Exercise to get to the Criteria Pick List screen.***

   Remember the poor title on the main graph, "Averages Response to All Polls?" We will be changing that next.

2. ***Right click and select behaviors/graph behaviors. Click the graph titles tab of the dialog.***

3. ***Click the box telling OptionFinder this label is to take precedence over meeting audience screen labels.***

4. ***Change the title to something a bit better like "Work Climate - strengths & weaknesses." Click OK***

5. ***Bring up the sequence behaviors dialog.***

   Suppose you want to ask the participants both criteria questions before moving on to the next list item, which means you want to rotate criteria before rotating the workplace factors.

6. ***Set the Rotate all... control to "criteria, then items."***

Look at "What's this?" help on the sequence controls for: Show graphs after, Polling Sequence, and Rotate All.

7. ***Save these changes and test the exercise design again, observing the effects of your changes.***

8. ***Change the rotation behavior back to "items, then criteria," then return to the agenda when you finish.***

Save the Criteria as Templates

The criteria you developed and fine-tuned for our "Introduction to Today's Process" exercises are the same ones you will be using in our "Work Climate" exercise. Instead of retyping these criteria in the next exercise, we're going to save them as templates and use them again. However, just so you don't clutter up our "Favorite Templates" folder with something you won't be using much, these instructions have you save the criteria as templates into your Learning folder.

1. ***Select the agenda topic "Introduction to Today's Process" and go to the linked exercise.***

   The Criteria Pick List appears.

2. ***Select the first criterion and select the Edit pulldown menu option Save Criterion as Template.***

   The *Save Template* dialog appears.

3. ***Give the criterion template a name or use the name it already has, then click OK.***

4. ***Select the second criterion and press HotKey <Ctrl+Shift+T> to make a template of it. Return to the agenda.***

You use these same steps to template questions and grouping dimensions. The <Ctrl+T> HotKey brings up the dialog for loading templates and the <Ctrl+Shift+T> HotKey brings up the dialog for saving a template.

Save the Process Behaviors as a Template

Again, to save energy you should template the behavior settings for the process you have tested.

1. ***At the Criteria Pick List, right click, select Behaviors /Sequence Behaviors.***

   The *Sequence Behaviors* dialog appears.

2. ***Click the Template button.***

   The *Behavior Templates* dialog appears.

3. ***Click the Save tab, and give the template a name ("Self assessment").***

4. ***Save all behavior sets and save them to the location just for this meeting. Click OK. Return to the criteria pick list.***

   This saves all behavior dialogs associated with this exercise as the template. You could have just saved the settings on the Sequence dialog if you wanted to.

   It also saves the template for access from just this meeting. If you do find the behaviors generally useful, you should save them in a user folder accessible to other meetings (for example, your "Favorite Templates" folder).

Save the Whole Exercise as a Template

By now you probably realize it would have been more efficient to save the whole exercise as a template, then just replace the list items with those of the "Work Climate" exercise. Here is how:

1. ***At the Criteria Pick List, or at the List itself, select the File pulldown menu option Save Exercise as Template.***

2. ***Give the template a name and specify a location in which to store it.***

3. ***Return to the agenda.***

Creating a Self-Assessment Exercise by Modifying a Template

This exercise has six self-assessment statements about work climate, and two criteria for judging them (the same two criteria you asked in our Introduction-to-the-process exercise). Here is how to set it up by using the exercise template you saved before.

1. ***Double click on the "Work Climate" agenda topic, and then click the Template button.***

   The dialog for loading exercise templates appears.

2. ***Select the user folder in which you stored the example process template and from the "List template for:" control select the List Processing Exercise. Your template name should appear in the "Load as name" box.***

   Rename the template "Work Climate" and click OK.

3. ***Bring up The List via the <F11> HotKey, and then delete the two statements used in the exampl***e.

4. ***Add these statements to the list:***

A. The performance appraisal process is fair and constructive.
B. People know what is expected of them and why.
C. Communication flows freely and honestly in all directions.
D. Trust levels between associates and management are high.
E. The right people get promoted.
F. Everyone feels involved in making the company better.

5. ***Change the title from "List Items" to "Factors affecting our workplace."***

   Use the same methods you just learned for changing an agenda title.

6. ***Right click and select Go to Criteria Pick List.***

   This is just to verify the criteria that were loaded along with the template.

7. ***Click the "Save and Close Current Window" icon, or press <F2>, twice to return to the agenda.***

8. ***Make sure your data source is set to Simulate.***

9. ***Highlight and launch the exercise.***

   The list appears first.

10. ***Press <F10> again to begin polling.***

    As the polls are presented, observe how they behave exactly as they did in our example process because you merely used a template of it.

Navigate Two-Criterion Graphs

In this section you will begin to use the HotKeys to explore the data collected during the poll. As you do so, notice how each change in the view could be useful for generating discussion about some aspect of the data.

1. ***Go to the graph view you want to work from.***

   If the default graph behaviors have not been changed, the graph that appears after polling is complete should have two axes with direction as the criteria defining the horizontal axis and performance defining the vertical axis.

   - If a two-axis graph does not appear, right click and select Change Criteria View, then select Both Axes.
   - If you need to change the criteria, right click and select Change Data/Criteria and define the criteria for both axes.
   - If you are not at an overall averages graph, press <F1> to bring one up.

   This is often called the "anchor" graph because it shows data for all list items.

   The upper right quadrant shows factors whose ratings say, "Describes us well and still improving." The lower right means, "Does not describe us, but is getting better." The lower left means, "Does not describe us and is getting worse." And the upper left means "Describes us, but we are losing it."

2. ***Take a closer look at an interesting rating by "zooming" in it (pressing the corresponding <item letter> key).***

   The first press of the <item letter> shows the list item in the title area of the graph. If you press a different <item letter>, its text shows in the title areas. However, if you press the same <item letter> twice, it "zooms in" on that item.

   In a two-criterion graph, this produces a scatter plot showing a data point for each person who responded to both criteria. That is, each diamond is a person's score on both criteria. The item letter is plotted at the average for everybody who responded.

3. ***Split the two-axis graph into each of its components.***

    - Press <Ctrl+F2> to show a single axis plot of the data for the criterion plotted on the vertical axis.

    - Press <Ctrl+F3> to show just the horizontal axis data.

    - Press <Ctrl+F1> to show both again.

Navigate One-Criterion Graphs

In this section, you are navigating among graphs of data for just one criterion. The same methods work for navigating among questions in the Questions tool.

1. ***Switch to the "overall average" or "anchor" graph (<F1> HotKey).***

2. ***Press <Ctrl+F2> to bring up a one-axis graph.***

    Now let's interpret the graph. Suppose your facilitation process is to celebrate the best, then focus in and talk about the worst workplace factors.

    - ***Sort the workplace factors (list items), based on average response, from highest to lowest score via the <F7> HotKey.***

    - ***"Zoom in" on the factor with the highest score by pressing the <letter key> identifying it twice.***

        You just zoomed in on the factor with the highest score by bringing up the frequency distribution for it, showing the percentage of the audience responding to each choice.

    - ***Go to the next best (next highest average) by pressing <right arrow>.***

- ***Now press <End> to jump to the worst rating, then press <Left arrow> to go to the second worst rating.***

  The <left arrow> and <right arrow> keys walk through the list items in the order they appear on the <F1> graph.

3. ***Press <F3> to bring up a graph illustrating the relative diversity in the data.***

   These too can be sorted if you want to walk through the data in order of diversity.

4. ***To show results for the other criterion, press <Ctrl+F3>.***

Trim the List of Work Climate Statements

This exercise introduces you to the List Trimming feature. List trimming is useful when you want to go through more than one evaluation process to reduce your list.

In this scenario, let's assume we have enough resources to make significant improvements over the next 6 months on our performance in only one of the areas listed above. We now need to take the items that scored poorly on this criterion and determine which we should focus on first.

1. ***From your agenda, right mouse click to bring up the pop-up menu. Select New Agenda Topic.***

2. ***Type "Action Plan," and click New Tool, then select the List Processing Exercise.***

3. ***Right click and select Go to Criteria Pick List.***

4. ***Press <Insert>, then at the Criterion Method dialog, select Paired comparison and click OK.***

5. ***Type, "Which item should we focus on first?" and click the Save and Close Current Window icon or press <F2>.***

6. ***Name the criteria "focus," and click OK.***

7. ***Press <F2> twice, give the exercise a name such as "action," and click OK.***

8. ***Highlight the "Work Climate" agenda topic, right click, select Purge current topic data, and purge all polling data.***

9. ***Launch the "Work Climate" exercise again. This time instead of pressing <R> to generate simulated data, press <L> on three of the items and <H> on the others.***

   If you press <R> to generate data the resulting graphs are usually flat. This time, we want a significant difference in the average score for the list items, so we need to skew some of the data high and some low.

   You should now have some data collected.

10. ***Bring up a one-axis averages graph for the performance criteria, and then press <F7> until the data is displayed from low to high.***

    Hint: If you can't remember how to bring up the different graph views, press <Shift+F1> to bring up the context-sensitive help.

11. ***Right click to bring up the pop-up menu. Select Edit/trim the list.***

12. ***Use your <right arrow> or <left arrow> key to move the arrow that now appears on your graph.***

    Move the arrow until it is over the last item that has a score of 2.5 or lower.

13. ***Right click to bring up your menu again, select Edit/Save the trimmed list. Click Yes.***

    The *Trim the List* dialog appears.

14. ***Click the control for another file, select the file named "Action," and click OK.***

15. ***Press <F10> to return to your agenda. Highlight and launch the "Action Plan" exercise. Return to the Agenda.***

Creating a "Slide" to Help with Introductions

For the first agenda topic, you will be using OptionFinder's "Topic Note" function to provide a little support for the introduction process. It really isn't an "exercise," but it can be quite useful.

1. ***Select the agenda topic "Welcome and Introductions."***

2. ***Use the right-mouse click to pop up a short menu of the functions available here and select the Agenda topic note to bring up the editing screen.***

   Notice the HotKey reminder on the pop-up menu.

3. ***Type in the following text:***

   Please...
   Tell us your name and department.
   Tell us why you think you are here.
   Remember, (Shift+Enter> moves you to the next line of text.

4. ***Press the <F2> HotKey to save the note.***

5. ***Test it by switching to Showtime mode, and then bring up the note with the <Ctrl+Shift+N> HotKey. Press <Esc> to return to the agenda.***

6. ***Switch to Design mode.***

Creating a List of Meeting Rules

In this section, you will use the list processing tool to present a list of rules governing the meeting. You will create a design file for the meeting rules and attach it to the agenda topic.

1. ***Double click on the "Meeting Rules" agenda topic (or press the <Enter> HotKey) to bring up the editor, and then click the New Tool button. This brings up the New What? Dialog box.***

2. ***Select the List Processing Exercise (since you are going to create a list of rules) and click OK.***

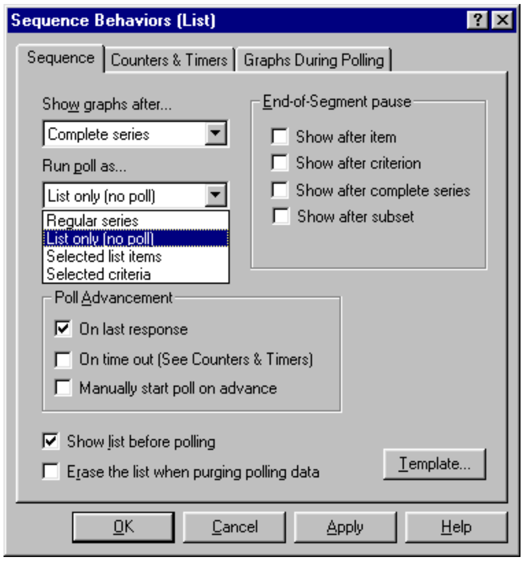
3. ***Change the title of the list from "List Items" to "Rules for Today's Meeting."***

4. ***Add the following rules to the list: "Everyone gets to participate," "No personal attacks allowed," "Stay on task," and "No whining."***

5. ***To get rid of the letters by the rules right click and select Behaviors /The List Behaviors to bring up the List item Behaviors dialog.***

6. ***From the Display tab, go to the Item identification style control, select "None," then click OK to close the dialog.***

7. ***Since there isn't any polling involved with this list, set the sequence behavior for the list to run as a list only.***



8. ***When you are finished with your list of rules, click the Save and Close Current Window icon.***

9. ***Give the exercise a name ("Meeting Rules") and click OK.***

10. ***Test the exercise.***

11. ***Toggle between Showtime and Design Screen modes, move some rules around, and change the font size for all the rules by using HotKeys.***

    If you can't remember the HotKeys, try the menus and right mouse click menu to refresh your memory.

Creating a Meeting Evaluation

In this section, you are using the Questions tool to create the final exercise for the meeting.

1. ***Double click the "Evaluate" agenda topic.***

2. ***Via New Tool, select the Questions tool and click OK.***

3. ***Create three questions of your own that address the following items (use Key Labels):***

    - Does your audience think their data (polling results and discussion) pretty well reflects reality? That is, did you get an accurate picture?

    - Did they like the process you used?

    - Do they have any suggestions for improving the process?

Creating an Exercise for Testing Keypads

In this section, you are creating an exercise just for testing the keypads. Your audience won't be using it, but it is good for making sure everything works correctly.

1. ***Double click the "Test Keypads" agenda topic.***

2. ***Via New Tool, select keypad test and click OK.***

3. ***Return to the agenda.***

Using the Master Design in a Sub-Meeting

You have spent all of your time so far designing your meeting process model in the meeting Master. In this section, you will open a sub-meeting to test your design in one of the sub-meetings.

Create Some Sub-Meeting Folders

In this section, you are creating folders to hold the data generated in each of the workshops.

1. ***From the File pulldown menu, select Go to OptionFinder database.***

2. ***Make sure the User folder "My Learning" and the Master meeting folder "HR Initiative (Master)" are selected.***

3. ***Click the Sub-meeting control in the Meeting folders group.***

   The sub-meeting controls are enabled.

4. ***Add a sub-meeting folder for your first workshop by clicking the Add button for Sub-meetings folders.***

   The *Add a new Sub-meeting folder* dialog appears.

5. ***Give the new sub-meeting folder a name for the first workshop (for example, London).***

6. ***Check the dialog for accuracy, and then click OK.***

   Your new folder now appears in the list of Sub-meeting folders.

7. ***Add two more sub-meeting folders to hold the data from your workshops in New York and Tokyo.***

8. ***Click OK.***

Open a Sub-Meeting

In this section, you are opening one of the sub-meetings instead of the meeting Master. The designs you created in the Master will control the events in the sub-meeting, but the polling data will be stored in the sub-meeting folder.

1. ***From the File pulldown menu, select Go to OptionFinder database to bring up the dialog for opening meetings.***

2. ***Select the London sub-meeting.***

Notice the sub-meeting opens and looks just like the meeting master agenda. However, the status line shows London as the meeting you are working in now.

Adjust the Sub-Meeting to Match the Workshop

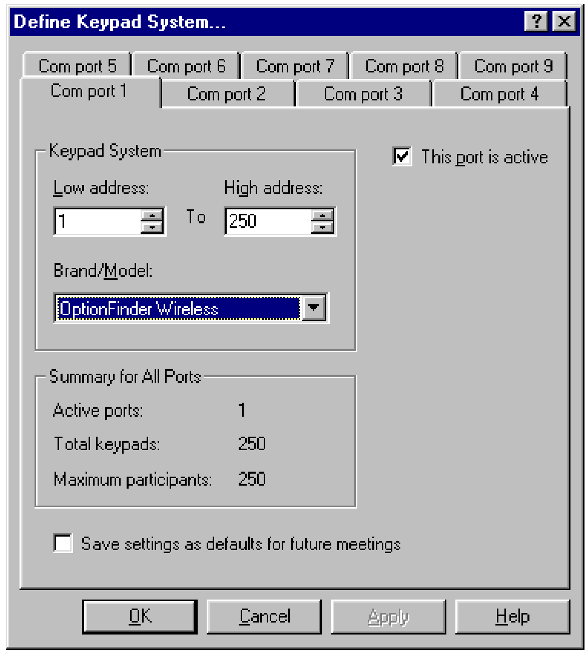
You will need to change the keypad universe for the keypads you will be using and change the variables for city and date.

Hint: Use the Meeting pull down menu.

Set the Keypad Universe

You need to tell OptionFinder how big your meeting is (the number of keypads that will be used in your meeting).

1. ***From the Meeting pulldown menu, select Keypads/Define Keypads***



This is the dialog for defining the keypad system you will be using for the meeting. It is important to set the "keypad universe" to the maximum number of participants that may attend.

Read the help for this dialog to better understand the relationship between keypad addresses and participants.

2. ***Make sure that the lowest keypad address and highest keypad address create a range that includes the keypads you are using.***

   For this example, assume you will be using keypads addressed 1-20.

3. ***Since all your workshops will have less than 20 participants, check the control to save settings as the default for future meetings.***

   This way you won't have to adjust the keypad universe each time.

4. ***Click OK to continue.***

Change the Variables to the Needs of the Sub-Meeting

For each sub-meeting the city and date will be different. Here is how to adjust them:

1. ***From the Meeting pulldown menu, select Variables /Define Variables.***

2. ***Enter the text for City and Date in the appropriate fields.***

Test the Sub-Meeting

In this section, you are testing one of the sub-meetings just to make sure the designs from the Master Meeting are working properly.

1. ***Run through a test of the design just as you did in the meeting master.***

2. ***Observe how everything behaves the same way.***

Test a Different Sub-Meeting

In order to take you through a data consolidation process, you will need to have data for two or more workshops. Here you are just simulating another workshop so you can consolidate their data.

1. ***Open a different sub-meeting.***

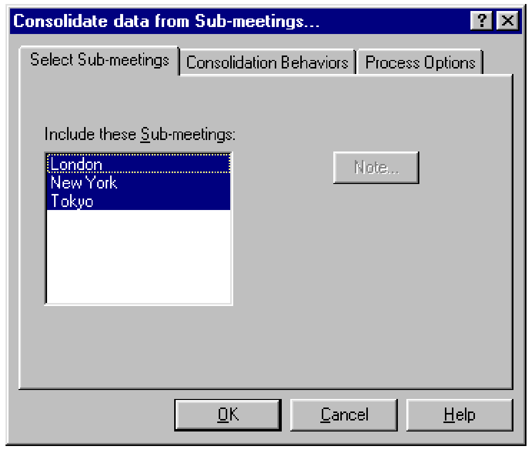
2. ***Simulate polling data for each of the polling exercises.***

Consolidate the Data from the Sub-Meetings

In this section, you will consolidate the data from your workshops into a single data structure. The consolidated total will be placed in the master meeting folder.

1. ***From the OptionFinder database, select the Master meeting tab, click Consolidate, and then click Apply.***

2. ***Click the Consolidation Behaviors tab and exclude all participants who never responded.***



This is the dialog for consolidating data from the sub-meetings. You can choose some or all of the sub-meetings to include in the consolidation.

The other tabs of this dialog control what data is included or what reports you want about what happened during consolidation.

3. ***Return to the Select Sub-meetings tab and select the workshops you want to include in the consolidation, then click OK.***

4. ***From the Select tab on the database, select your master meeting again and click OK.***

From the agenda, highlight the "Introduction to the Keypads" topic, and then press <F9> to view graphs.

Make sure you are on a frequency graph. Use <F7> to switch the view from percentages to counts. You should see consolidated totals.

4. Saving and Re-using Templates

Goals for this Chapter

This chapter is a review of saving and loading templates.

Saving Templates

You ran your meeting and it was so successful you intend to reuse its components in the future. So you wisely decide to save some templates. Here is how:

Save Templates of List Processing Criteria

Say you want to save the criteria you used for evaluating the work climate factors.

1. ***Open the HR Initiative (Master) Meeting***

2. ***Highlight the agenda topic that you want to use.***

3. ***Press <F12> to get to the Criteria Pick List.***

4. ***Either press <Ctrl+Shift+T> or on the Edit menu, click Save Criterion as Template.***

   This brings up the *Template* dialog.

5. ***Place the template in the "Favorite Templates" user folder.***

6. ***Save the second criterion as a template too.***

7. ***Press the <Ctrl+Home> HotKey to return to the agenda.***

Save Exercise Templates

Suppose you want to save the whole "Work Climate" exercise as a template.

1. ***At the agenda, highlight the "Work Climate" topic and press <F12> to bring up the Criteria Pick List.***

2. ***Select the File pulldown menu option Save as Template to save the exercise design as a template.***

3. ***Press <Ctrl+Home> to return to the agenda.***

Save Meeting Templates

The meeting was so good you decide to save the whole meeting as a template.

1. ***From the File menu, select Go to the OptionFinder Database.***

2. ***Click on the Master meeting tab and select the Save As action, then click the Apply button.***

   The *Save the <Name> Meeting Folder As* dialog appears.

3. ***Under New Folder Type, click Meeting template.***

4. ***Select "Favorite Templates" as the user folder in which to store the template, then click OK.***

Re-using Templates

Of course, saving templates is only useful if we can use them later. In this section, you will retrieve or "load" some templates that have been saved.

Load Meeting Templates

First, let's load the meeting template you just made.

1. ***Go to the OptionFinder database.***

2. ***Click the Select tab, and then click on the Meeting Add button to add a new meeting.***

3. ***At the New meeting dialog, select the Get a template method and click OK.***

4. ***At the Get a Meeting Folder Template dialog, select the user folder in which you stored the template (Favorite Templates).***

5. ***Select the meeting template you want to retrieve and give the folder a new name.***

6. ***Click OK to create the duplicate meeting from the template.***

To view the new meeting you created from a template, find the new meeting in the Meeting folder on the *Select* tab of the OptionFinder database, and click OK at the dialog.

Load Exercise Templates

How about loading the "Work Climate" exercise template?

1. ***Return to your agenda.***

2. ***Press <Insert> to add a new meeting topic.***

   The *Agenda Topic Editor* appears.

3. ***Press the Template button.***

4. ***In the List templates for list, select the List Processing tool.***

5. ***Select the template you want to use from the Existing templates list and click OK.***

   You will have to give the file a new name since you already have the exercise in this meeting and you don't want to overwrite it.

Load Criteria Templates

How about loading the criteria templates?

1. ***Return to your agenda and add a new meeting topic.***
2. ***Create a new tool and select List Processing; give it a descriptive name.***
3. ***Right click and select Go to Criteria Pick List.***
4. ***Click the Load Criterion Template icon (or use the Edit pulldown menu option Load criterion template, or press <Ctrl+T>).***
5. ***Bring in your templates.***

5. Navigating Graphs

Goals for this Chapter

This chapter reviews the basic procedures for navigating among the various graph views in OptionFinder.

Understanding the Basic Graph Types

There are many ways OptionFinder can graph the response data you have collected. The following are the graph types that are used the most.

Frequency Distribution Graphs (<*F2*> HotKey)

A frequency distribution shows you how many people choose each response choice for a particular question or list item. You can view a frequency graph by pressing <*F2*>. Once you are looking at a frequency distribution, you can press your <*arrow*> keys to move to the graphs for other questions, list items, or grouping dimensions, in the same exercise. Use letter keys to jump directly to another Frequency graph.

Frequency Distributions for Subgroups of the Audience (<*subgroup number*> HotKey)

If you have used the Groups tool to put participants into subgroups for one or more grouping dimensions, you can look at the frequency distributions for a particular subgroup, one subgroup at a time. Here's how to do it:

1. ***Make sure the grouping dimension you want is loaded.***

   Check the right side of the graph screen.

2. ***If there is no grouping dimension indicated, or you want to load a different one, press <Ctrl+G>.***

3. ***Highlight the grouping dimension you want and press OK.***

   Notice that the grouping dimension is indicated at the right of the graph.

4. ***To look at the responses of just the members of the first subgroup, press the number <1> on your computer keyboard.***

   Notice that the Group label on the right side of the screen has changed and now lists a specific subgroup within that group, filtering out the other participant data.

5. ***To look at the responses of the next subgroup, press <2>.***

   Remember when you built the Group polling screen? The possible subgroups ("Sales and Marketing," "R&D," etc.) were numbered. The number for a particular subgroup on the polling screen is the number you press at the graphs to see that subgroup's responses. (It was also the same number the participants pressed on their keypads to "log in" to the subgroup.)

6. ***To bring back the graph of the whole audience's responses, press <0>.***

   Zero is always reserved to display the responses of the whole audience.

7. ***To switch to another grouping dimension, press <Ctrl+G>, highlight the grouping dimension, and press <Enter>.***

Averages for All List Items or Questions (*<F1>* HotKey)

An averages graph shows the average response of all the participants to each question or list item in the exercise that has been polled so far. When you are looking at any graph, press *<F1>* to display the averages graph. These are often called "anchor" or "summary" graphs because they show the whole picture.

Averages only make sense on questions whose responses choices are in the form of a scale.

Understanding Standard Graph Navigation Techniques

Usually, when you use OptionFinder, you will be looking at only a few graphs: frequency distributions and averages graphs. If you can get comfortable moving back and forth between these kinds of graphs, you will most likely be able to do everything required for your meeting.

Practice using your letter keys and arrow keys to move from one frequency distribution to another. Then practice switching from a frequency graph to an averages graph by pressing *<F1>*. From an averages graph, practice pressing a *<letter key>* to go to the frequency distribution of a particular question or list item.

When you master this, you should be in very good shape. For a full listing of the entire graph HotKeys, refer to the pull down *Help, Contents, Index* tab. Type in "HotKeys" and select "for navigating among graphs." Note that other HotKeys are listed in the same place.

Bringing Up Graphs of Earlier Exercises

There will be many times when you want to bring up the graphs from an earlier exercise.

1. ***Highlight the agenda topic.***

2. ***Press <F9> to bring up graphs.***

Once you are viewing a graph, you have easy access to all the other graphs in that design file.

6. Backing Up and Restoring

Goals for this Chapter

When you have finished running the meeting with the real audience and have produced data too important to lose, you should make a backup of the meeting folder onto a floppy disk or onto a network drive for safekeeping.

Backing Up an OptionFinder Meeting

When OptionFinder backs up a meeting, it makes a copy of the meeting folder, compresses it, and stores it in a location you designate, typically a floppy disk or a network drive. Your original meeting folder and its response data will still be on your computer.

1. ***If you are still in your meeting folder, bring up the OptionFinder database dialog.***

2. ***Select the meeting folder you want to back up.***

3. ***Click the Meeting tab, choose the action Save As, and click Apply.***

4. ***Choose Compressed meeting backup as the New Folder Type.***

5. ***Select the drive you want to back up this folder to.***

   OptionFinder by default is ready to back up onto your "C:" drive. Change the *Drive* control to (-a-) if you want to back up to a floppy disk in drive A:

6. ***Be sure all the "include" options are checked.***

7. ***When everything is correct, click OK.***

Restoring a Backed-up OptionFinder Meeting

If you have used OptionFinder to back up your meeting, you must use OptionFinder to restore it as well.

1. ***Go to the Select tab in the OptionFinder Database dialog.***

2. ***Click the Add button for meetings. The Add a Meeting dialog appears***.

3. ***Choose Restore a Backup as the method and click OK.***

4. ***Select the drive where the backup is stored, and then select the user folder if necessary.***

   Note: If you backed up to a floppy disk or network directory where no user folders existed, OptionFinder creates a dummy user folder named "BAK."

5. ***Give a name to the meeting folder you are about to create.***

   If you already have a meeting folder with the same name on your computer, OptionFinder will stop you. You will have to use a different name or delete the existing meeting.

OptionFinder decompresses the backed-up meeting folder and copies it onto your computer. The backed up version of the meeting still exists in the storage area you accessed it from.

7. Using HotKeys and Icons

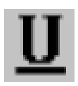
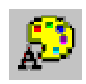
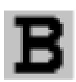
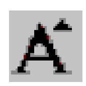
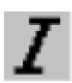
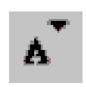
Goals for this Chapter

You have now worked your way through the basic features of OptionFinder. There is a lot more to learn and we encourage you to explore with the User Guide, the on-line help system, and through training classes. Anytime you find yourself thinking, "I wish OptionFinder could do this," make the assumption that it can and either look for it on your own, or call us to find out how. Remember, practice may not make perfect, because every meeting is different. But practice sure helps. In this chapter, we will review the HotKeys and icons that you will most commonly use as you gain experience with OptionFinder. Have fun!

OptionFinder HotKeys

The following chart shows just some of the HotKeys you can use to help you work with OptionFinder in Showtime mode.

HotKeys for Editing and Defining Text

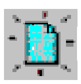
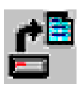
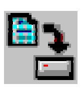
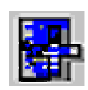
HotKey	Represents	HotKey	Represents
<Ctrl+U> 	Underline the blocked text or toggle underlining on/off for the next character	<F11> 	Color the blocked text or select a different color for the next character
<Ctrl+B> 	Bold the blocked text or toggle bold on/off for the next character	<Alt+>> 	Increase the Font Size for all text in the current area of the screen
<Ctrl+I> 	Italicize the blocked text or toggle italics on/off for the next character	<Alt+<> 	Decrease the Font Size for all text in the current area of the screen

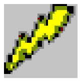
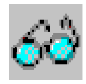
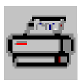
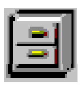
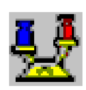
Other Useful HotKeys for Editing Text

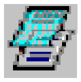
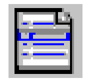
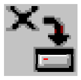
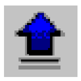
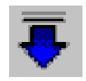
<click & drag>	Block text
<Ctrl+C>	Copy blocked text to the Windows clipboard
<Ctrl+X>	Cut blocked text to the Windows clipboard
<Ctrl+V>	Paste the contents of the Windows clipboard at the insertion point
<Ctrl+G>	Change the case of blocked text (to all upper or lower case)
<Ctrl+Del>	Clear (erase) all text in the current area of the screen
<Home>	Go to the beginning of a line of text
<End>	Go to the end of a line of text
<Arrow>	Go up or down one line in the current area of the screen
<Ctrl+Arrow>	Go left or right one word
<Tab>	Go to the next area of the screen
<Shift+Tab>	Go to the previous area of the screen
<Shift+Enter>	Force a new line of text (instead of waiting for word-wrap)

OptionFinder Icons

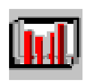
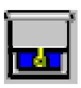
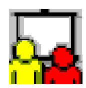
OptionFinder Icons for Creating or Managing an Exercise

Icon	Represents	Icon	Represents
	Create a new OptionFinder exercise		Define the keypad system (number of pads, ports, brand, model)
	Open an existing exercise		Test the keypads for proper function
	Save any changes made to the current exercise		Add something to the current screen (agenda topic, list item, criterion, question) <Insert>
Icon	**Represents**	**Icon**	**Represents**

	Purge test data from all exercises attached to topics in the current agenda		Define the overall Look & Feel for the meeting (colors, fonts, timers & counters)
	Create, read or edit a note about the exercise file <Ctrl+N>		Bring up the editor so changes can be made (agenda topic, list item, criterion, question) <Enter>
	Print data for the current exercise <Ctrl+P>		Bring up the Behaviors dialog for the current selection (question, the list, criterion, agenda) <Ctrl+F8>
	Go to OptionFinder Database to switch to a different meeting folder (or to work on folders in your database)		Bring up the Behaviors dialog for the current exercise to define the sequence of events <F8>
	Go to the exercise linked to the selected agenda topic <F12>		Bring up the Behaviors dialog for the current exercise to define what graphs to show
	Bring up context-sensitive help for the current selection (dialogs) or view (audience screens) <F1>		Go to the Criteria Pick List (when working with a list processing
Icon	**Represents**	**Icon**	**Represents**

	Load a previously saved template (agendas, criteria, response choices, etc.) <Ctrl+T>		Go to The List view (when working with a list processing exercise) <F11>
	Close the current window, saving any changes if they have not been saved already <F2>		
	Move the current selection up one position (agenda topics, questions, list items, criteria) <Ctrl+Up arrow>		Move the current selection down one position (agenda topics, questions, list items, criteria) <Ctrl+Down arrow>

OptionFinder Icons for Running a Session (Showtime Mode)

Icon	Represents	Icon	Represents
	Run a TurboQuestion (bring up a blank question screen for an unplanned question) <Ctrl+Q>		Display graphs for the selected exercise <F9>
	Hide the screen (blank out the whole screen) <Ctrl+H>		Toggle between Showtime mode (where screens don't have menus, etc.) and Design mode (where the Windows interface is available) <Ctrl+M>
	Run (usually poll) the next scripted event in the selected exercise <F10>		

4399 36th Street
Orlando, FL 32811
Tel: 407-872-3333
Fax: 407-872-3330
e-mail: info@optiontechnologies.com
www.optiontechnologies.com