

Distance Learning Course Development Guide

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1. About this Guide

This guide is an attempt to compile and document all the development processes, best practices and lessons learned throughout the previous Distance Learning development experiences. All Distance Learning development personnel roles and responsibilities have also been addressed.

Although Distance Learning teams have produced several courses, this guide is still a *living* document to reflect possible after thoughts and refinements, especially in regards to building courses based on the an LMS.

The LMS system has presented new challenges and practices for the Distance Learning projects while developing for a Windows based LMS application. Areas especially impacted will be extending definition and practice to the typographic style guide, and refining techniques in the use of the demonstration-building tool Adobe Captivate and Techsmith Camtasia. Defining best practices for applying the training database as a WBT component will also require further attention.

It is recommended that you read previous WBT project final reports in conjunction with this guide to get a perspective on past efforts and recommendations for future development.

2. Getting Organized

What is a Distance Learning course?

There are four possible components presented to the trainee:

1. Static pages, with text and LMS screen shots or some graphical support that present the lesson in a conceptual form.
2. A demonstration of all associated lesson tasks, delivered via slides or animation containing a detailed series of LMS screen shots with an audio voice-over.
3. A guided practice session uses an interactive application simulation model, where the user duplicates the tasks that were previously demonstrated.
4. An actual simulation of using the real Aleph software in a dynamic environment isolated from the production version, called the *training database*.

The Typical Distance Learning development team

As usual here at CCLA, we have an appointed team of players of complimentary skill sets to accommodate the development of Distance Learning courseware.

Project Lead	management sponsor
Instructor (primary SME)	Website Team rep. (graphics & Web standards)
Secondary SMEs	Communications group rep. (editorial)
Developer (programming)	Software Support Tech (system testing)
Instructional Designer	Network group rep.(server support)

Typical project phases (the big picture)

A traditional Instructional Systems Design model is employed using the following phase breakdown. A Distance Learning team is assembled, drawing from several subject content and technical experts to guide the overall project development process. The project lead will oversee the progress and development of each phase of development and utilize appropriate Distance Learning team members to fulfill the resource needs. A detailed Project Management Plan (timeline and milestones) will be created in MS Project.

Analysis: The instructor: primary Subject Matter Expert (SME), and Instructional Designer will do a needs and tasks analyses that will culminate into a detailed course content outline.

Design:

1. Study the content outline and determine the best hierarchical structure for units and lessons.
2. Determine learner activities: demonstrations, practice sessions, and assessments to be developed.

Development:

1. Lesson Introductions: The SME will document in MS Word the detailed lesson concepts and assessments.
2. Demonstrations:
 - a. SME creates lesson supporting demonstrations (raw)
 - b. Developer reviews scripts for adherence to instructional design best practices and converts demonstrations into Macromedia Flash files and adds audio narrations
3. Guided Practice: Convert previous lesson demonstrations into interactive guided exercises.
4. Practice Session scripts:
 - a. LSC instructor creates lesson supporting scripts for the training database
 - b. Developer reviews scripts for adherence to instructional design best practices.
5. Review cycle: See "WBT Review Process" section for the details.

Integration:

The instructor imports all lesson files into D2L and builds (copy & paste) all supporting assessments in the D2L Assessment Builder. Developer reviews imported files and imports associated demonstration files. He also assures overall consistency and quality of the presentation, making final adjustments or refinements.

Evaluation (internal):

1. An alpha acceptance testing of integrated course is performed by the Website Teams.
2. Courseware is released to all staff for (beta testing) internal review and comment collection.

Final product release

Communication group prepares product announcement to the colleges
Final Authority sponsor approves general release to community colleges
in conjunction with the LMS implementation schedule.
Production server is loaded and configured for final course delivery.

The course content outline

Before any detailed course content is developed, It is important to have an outline that is 95% accurate and well thought out and reviewed by the other possible SMEs and ID (Instructional Design) personnel. This outline must be kept current and copied to the WBT project “O” drive. Guidance and a MS Word template file will be provided to promote good communications in regard to readability and historical tracking. See “Using MS Word” in this guide for details on using MS Word features.

Building your files

Project software

The primary software development tools for the Distance Learning instructor are:

- MS Word: The SME will use MS Word for creating and reviewing course text-based material.
- SnagIt: The instructor will use SnagIt for all static LMS screen captures or graphics (that are not already in a file format). They will also utilize SnagIt Studio to add callouts and highlights to static screen shots.
- Captivate: The instructor will use Captivate for dynamic (animated) screen captures for lesson demonstrations.

Other software tools that may be used by the Distance Learning team to support the above major development tools are: PowerPoint, Excel, Visio, and Flash. Graphics creation and editing for Distance Learning projects is done using Adobe Illustrator, Photoshop, or Adobe Fireworks.

Assistance with acquiring or using these software tools will be provided. Please submit your request to the project lead. If you need other personnel as a development resource, this must be also coordinated with the project lead.

File structures and integration

All related Distance Learning course content files would be saved to preset folders on the \Projects\Web-based Training directory. This will serve as the master archive for all projects. You should first build your project files on your “M” drive. It is imperative that these files be copied to the “O” drive Distance Learning project folder on a daily basis. It is good to have a quick accessible alternate copy of your working files.

A MS Word Template file will be provided to ensure typographic consistency. More detail is given in section “Using of MS Word.” It is also important to follow the prescribed style guide and demonstration building guidelines provided in this document. An effort will be made to keep this guide as current as possible.

The instructional Designer/Developer will guide the set-up of the following file structures. All of these files will come together in D2L towards the end of the course project development as defined in the Project Management Plan (PMP).

Text

Store your files in the directory
Projects\Web-based Training*(your course\Word)*
Use provided template file to get started
Name your files appropriately using the convention used in the Course Content outline.
Create a folder for each Unit.
Create a file for each lesson and for each quiz or test.

Graphics

Store your files in a subfolder for graphics:
Projects\Web-based Training*(your course\Graphics)*
Save your screen shots to the graphics folder, following the naming convention in association with the Course Content outline.
Insert graphics into each related lesson file: Use MS Word menus
Insert > Picture > From File

Screen shots

1. Store your files in a subfolder for screen shots:
Projects\Web-based Training*(your course\Screen Shots)*
2. Save your screen capture to the Screen Shots folder, following the naming convention in association with the Course Content outline.
3. Insert screen shots into each related lesson file: Use MS Word menus
Insert > Picture > From File

Lesson demonstrations

Store your files in a subfolder for Captivate:
Projects\Web-based Training*(your course\Captivate)*
Save your lessons to the Captivate folder, following the naming convention in association with the Course Content outline.

Training database (TD) scripts (practice session)

1. Create your scripts in MS Word with the format specified in the “Online Practice Session” section of this guide.
2. Store your files in a subfolder for TD scripts:
O:\Projects\Web-based Training*(your course\TD scripts)*
3. Save your screen shots to the TD scripts folder, following the naming convention in association with the Course Content outline.

Using MS Word

General

CCLA has now standardized on MS Word 2000 for textual based electronic communications. This is also a well-supported format in the Blackboard Learning System. Blackboard will serve as our platform and server for all future WBT courses. See “Using Blackboard” section of this guide for more details on importing MS Word files in Blackboard.

The role of Word files in our WBT is to be introductory text and screen shot pages to briefly describe the lesson content to be demonstrated. This will *not* be a step-by-step presentation, but instead, just an overview. Use text to outline training variances such as agency codes, patron types, material types, etc. Focus on providing the big picture or anything that builds a foundation setting the framework for the demonstrated lesson. Text should be accompanied by a SnagIt screen shots, as necessary, to illustrate the content. Use the training database for screen shots examples taken directly from the LMS application. This would only be used to support introductory subject matter. Import system level or procedural supporting flow charts and/or graphics. All assessments (lesson quizzes, unit tests, and final exam) should be entered in separate MS Word files. These files will later be converted to Blackboard assessments. See “Using Blackboard” of this guide for details.

Use of bullets and list

Break up paragraphs whenever possible, especially in the Introduction, Objectives, Summary and Overview sections. Use of the template with established styles will make this easier. See “Use of Templates” below for details.

Fonts

Use Arial 11 point font for the body text and Arial 12 point bold font for headings. This size looks better and is in proportion to other fonts used in the Blackboard system. This is subject to change based on how future Blackboard presentation features may be utilized. Use of the template with established styles will make this easier. See “Using Templates” below for details. This guideline document and associated MS Word templates will be updated when necessary.

Use of master file

MS Word has a feature that allows multiple files, like chapters of a book, to be viewed as a single file. Each lesson would remain as a separate file. A unit of instruction would consist of a compilation of these lesson files. Any sub-document can be converted to part of the master document at any time (without copy & pasting).

The primary benefit of the Master Word file would be for distribution of a unit of instruction for formative and editorial reviews. This provides easier access and assures a coherent set of related subject matter to be reviewed in context. This could also be considered a storyboard form of the courseware.

Use of templates

MS Word has a feature called Styles. This feature offers the ability to assign a textual block or element (heading) a unique typographical format. This can include the font and paragraph formatting. The style is given a name that is saved in a list of styles that can be easily viewed and applied. A MS Word template is a collection of styles. It is important to get acquainted with this MS Word feature and learn to use it properly to keep all WBT files consistent.

At least three MS Word template files will be created for WBT development. One file for the course content outline, another for the typical lesson pages, and one for the master file. They will be named Outline template, Lesson template, and Master template. Open the template and rename it before working with it. These files will reside in the project folder at....

Projects\Web-based Training\\Word.

3. Style Guide and Distance Learning Conventions

Introduction

The “Microsoft Manual of Style for Technical Publications” (MSTP), version 3, will be the standard for typographic formatting in WBT courses for the LMS. It is also used by the Communications workgroup as their core standard. It provides a Windows centric guide for treatment of Microsoft Windows screen elements. Much more emphasis will be placed on the use of this style guide for developing future course content.

Microsoft provides an indexed online help file that will be installed on each SME computer. This will serve as a quick reference for all style implementation questions. There will be some deviations from the MSTP, these exceptions, or unique applications will be covered in the section “Other WBT Style Conventions.”

This MSTP is intended to give clear, up-to-date, and easy-to-use advice about usage and presentation of both general and computer-related terms, sentence style, technical writing issues, and design and interface elements. The purpose of the MSTP also defines terms and concepts, particularly those dealing with the Internet and the World Wide Web.

This guide is to help writers and editors maintain consistency within and across Microsoft Windows applications. It is not a set of rules. It does provide guidelines that have been discussed and reviewed by experienced writers and editors around the world. The Microsoft Manual of Style is not a text on technical writing.

Key excerpts from Microsoft Manual of Style will be presented in this WBT development guide. The intent is to highlight some of the most common applications used in the LMS applications for WBT courses. The examples provided are not substitutes for using the provided online reference when you don't know how to typographically treat your course content.

Procedure writing examples

Even though procedure writing will be minimized in the MS Word files, many of the following principals and conventions will also apply in the Captivate demonstrations.

A procedure is a short description of the steps a user takes to complete a specific task. In printed and online documentation, procedures are set off from the main text by their formatting, usually some kind of a list format.

Always present a procedure in a numbered list, and in most cases introduces it with an infinitive phrase (in verb form – action), see example on this page, below. The procedure heading serves as the introductory phrase, which follows the style of your design template. Do not add punctuation at the end of the heading. Avoid intervening text between the procedure heading and the numbered list.

Procedure lists

Most procedures consist of a number of steps. Try to limit a procedure to seven or fewer steps. Instructional design experts say this is the maximum number of items people can remember at once.

Multiple-step procedures

General rules for lists also apply to procedure lists -- especially the following:

Set individual steps as separate, numbered entries. However, short steps, if they occur in the same place (within one dialog box, for example), should be combined. Both of the following examples are correct, although the first is more commonly used.

Correct examples:

1. On the Tools menu, click **Options**, and then click the **Edit** tab.
2. On the Tools menu, click **Options**.
3. Click the **Edit** tab.
 - Use complete sentences.
 - Use parallel construction (effective use of repetition—opposite clauses).
 - Capitalize the first word in each step.
 - Use a period after each step. An exception is when you are instructing users to type input that does not include end punctuation. In this case, try to format the text so the user input appears on a new line.
 - For online presentation, keep a procedure to one screen, if possible.
 - Avoid burying procedural information in narrative text; the procedure will be hard to find and follow.
 - For single steps use a bullet mark, not a number. When in doubt, it is better to use additional steps to guide the user, instead of combining actions.

Procedural syntax

As a general rule, tell the user where the action should take place before describing the action to take. This prevents users from doing the right thing in the wrong place. However, avoid overloading procedures with locators. Assume that the user is looking at the screen and is starting from the position where the procedure begins. For example, the following phrasing is typical: "On the View menu, click Zoom."

However, if there's a chance users might be confused about where the action should take place or if an introductory phrase is needed, the following wording can be used: "If you want to magnify your document, click View, and then click Zoom ", or "In Control Panel, double-click Passwords, and then click Change Passwords."

Note: It's not necessary to end a procedure with "Click **OK**" unless there's some possibility of confusion.

Main elements in the interface

The following sections give brief guidelines on how to treat the main elements in the interface: folders and icons, commands, and dialog box options.

Folders and Icons

Users click or double-click a folder or an icon to initiate an action--for example, starting a program or viewing a list of subfolders.

When you want the user to	Use this syntax
Activate a program icon that is already running on the desktop	Click the Microsoft Excel button on the taskbar. Switch to Microsoft Excel .
Start a program	Click the Start button, and then point to Programs . Point to the folder that contains Word, and then click Word .
Select an icon before changing its properties, moving it, and so on	Right-click the PowerPoint icon, and then click Properties .
Choose a Control Panel icon	In Control Panel, double-click the Printers icon.
Choose any other icon, such as a folder icon, drive icon, and so on	Double-click the Recycle Bin icon.

Commands

Use the following syntax for commands. If you decide to document more than just mouse procedures, use the word *choose* instead of *click*. Also, use *from the menu*, not *on the menu*.

When you want the user to	Use this syntax
Carry out a command from a program menu	On the Tools menu, click Address Book .
Carry out an action from a dialog box reached from a menu command	On the Tools menu, point to Language , click Hyphenation , and then select the Automatically hyphenate document check box.
Carry out a command from a dialog box	Click Apply .
Carry out a command from a submenu	Click the Start button; point to Documents , and then click the document you want. Click the Start button, point to Programs , and then click Windows Explorer .

Dialog box options

Use *click* for selecting dialog box options and tabs and for choosing command buttons. However, if your group uses the combined mouse and keyboard method of documenting procedures, use *choose* for command buttons, because command buttons actually carry out a command and are not options (or settings) in the sense that the other elements of a dialog box are. In this method, use *select* for all other dialog box options, including tabs.

Tell users to *type* (for specific item) in text boxes or *enter* (for generic use) an element such as a file name that they can either type or select from a list.

When you are referring generally to a feature, *turn off* and *turn on* is acceptable. Use *select* and *clear* to refer to check boxes. You can say "click to select" if the action may not be obvious to your audience.

The following table gives a few examples. For procedural syntax for every dialog box and option, see Dialog Boxes and Property Sheets in the online MSTP reference.

When you want the user to	Use this syntax
Select an option	In the Print dialog box, click All .
Open a tabbed section in a dialog box	In the Font dialog box, click the Character Spacing tab.
Insert something in a text box that has a list box attached	In the File name box, enter the name of the file.
Select among check boxes	On the Print tab, select the Comments and Hidden text check boxes.
Look in a particular grouping of options or check boxes	Under Include with document, select the Comments and Hidden text check boxes.

Procedure style

Follow standard document conventions in procedures.

- Follow interface capitalization. Usually, menu and command names use title caps. Capitalization of dialog box options varies. If in doubt, or if necessary for consistency, use sentence style caps.

Correct example:

Click **Date and Time**.

Select the **Provide feedback with sound** check box.

- If a command name or dialog box option ends with a colon or ellipsis, do not include this punctuation.

Correct example:

Click **Save As**.

- Limit your use of the descriptors *button* and *option button*, except where the descriptor helps to avoid confusing or awkward phrasing or is necessary to avoid confusion with another element.

- User input can be on the same line as the procedural step, or it can be displayed on a new line. If the input is on the same line, what the user types should be the last word or words of the step and should not be followed by end punctuation (unless the user needs to type the end punctuation).

Correct example: (*also see “Other WBT Style Conventions”)

Type ***password**
In the Date box, type:
April 1

- Use a monospace font (courier) for program input and output text.

See also; Code Formatting Conventions, Dialog Boxes and Property Sheets, Document Conventions, Menus and Commands in your online MSTP reference.

Mouse vs. keyboard procedures

You can document procedures in one of three ways:

- Mouse-only actions, using terms such as *click*, *double-click*, and *point to*.
- Combined mouse and keyboard actions, using general procedural terms such as *select* and *choose* to avoid distinguishing between the two methods.
- Separate mouse and keyboard actions, explaining first the mouse method and then the keyboard method. Whenever possible, avoid a page break between the keyboard and the mouse versions of a procedure. The trend is to document with mouse-only actions.

Branching within procedures

If there are multiple ways to do an entire procedure -- and if you have to describe each alternative -- use a table to detail the alternatives, similar to the following example. This helps the user know when to use which method. It is recommended that that you avoid alternative procedures and document only the method of best practice. If needed, see MSTP online reference for more detail and more examples.

Correct examples:

To	Do this
Save changes to the existing file	On the File menu, click Save .
Quit without saving changes	On the File menu, click Exit .

If one step has an alternative, that alternative should be a separate paragraph in the step. In a single-step procedure, an alternative can be separated by the word or to make it clearer to the user that an alternative is available.

Supplementary information and text within procedures

Most of the time, users go to procedures for reference, not for instruction. Avoid putting explanatory or supplementary information, which describes special cases or behaviors that are not essential to completing the procedure, within the procedure itself. If supplementary information is necessary to describe a procedure, put it in a single paragraph after the procedure. If absolutely necessary, put such a paragraph after the step it explains and indent it to align with the procedure text. If the supplementary information includes steps, make it a separate procedure and provide a cross-reference. Avoid explicit descriptions of system responses. If necessary to orient the reader, include the response in the step or the one immediately following. For information about documenting key commands, see Key Names and Press, in the online MSTP reference.

Correct

Click **Options**, and then select the **Reverse Print Order** check box.

1. Click **Options** to display more options.
2. Select the **Reverse Print Order** check box.

1. Click **Options**.
2. In the expanded list of options, select the **Reverse Print Order** check box.

Incorrect

1. Click **Options**.
The dialog box expands to display more options.
2. Select the **Reverse Print Order** check box.

More on menus

The previous information regarding the treatment of menus was in context to procedure writing. Here is a review and more information and specific examples of menus containing commands, menu terminology, types of menus, and style of menu names and commands.

Menus with commands

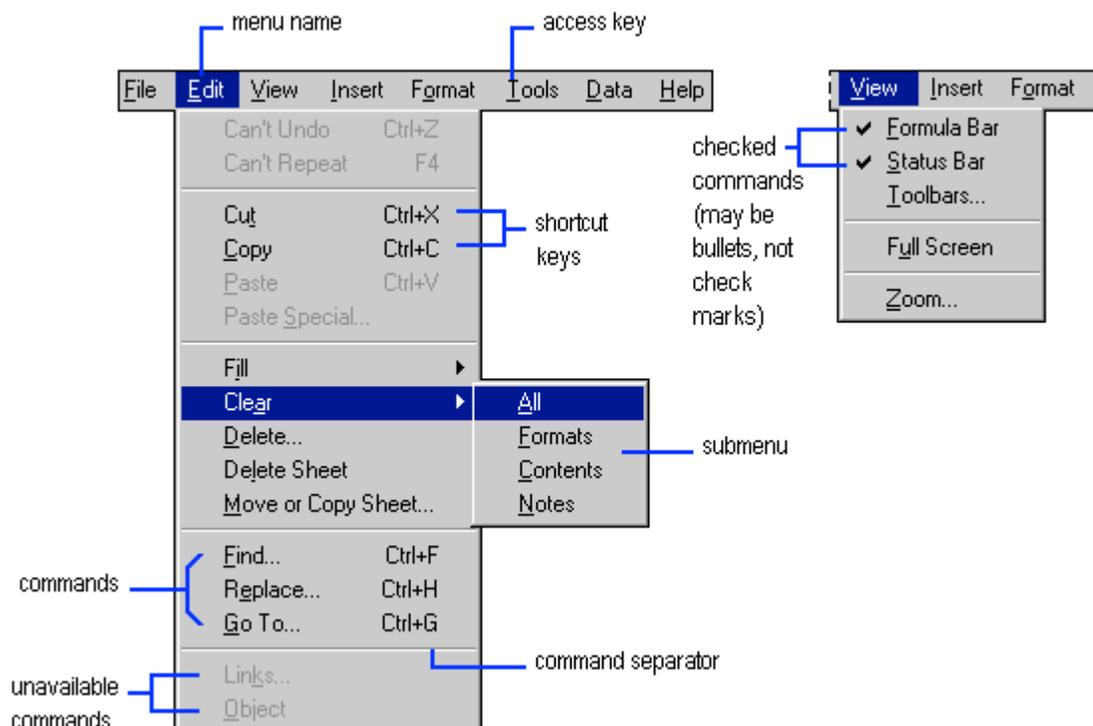
Dialog boxes contain command buttons and options. Do not refer to a command as a *menu item*, a *choice*, or an *option*.

Note: when you can, customize the menu bar and toolbar by adding additional menus, by putting menus on toolbars, and by dragging toolbar buttons to a menu, it does not change the essential characteristics of these items. However, they should still be treated as menus, commands, and so on.

Use *click* when referring to selecting or choosing commands, options, and dialog box buttons in procedures.

If, however, you are documenting both mouse and keyboard instructions, you can use the generic *choose* or *select*. In this case, the user *selects* or *opens* menus; *chooses* commands that are on the menu; *selects* dialog box options; and *chooses* command buttons in dialog boxes. For information about dialog box terminology, see Dialog Boxes and Property Sheets in your online MSTP reference.

The following illustration shows elements of menus. The callouts use capitalization that's correct for the item, not for usual Microsoft callout style.



Menu terminology

Menu terminology deserves special attention and appropriate treatment.

- When referring to a specific menu, lowercase the word *menu*, as in "the Edit menu."
- Avoid the words *cascading*, *pull-down*, *drop-down*, or *pop-up* to describe menus except in some programming documents. See Types of Menus below.
- Refer to unavailable commands and options as *unavailable*, not as *dimmed*, *disabled*, or *grayed*. In programming contexts, however, it's acceptable to refer to unavailable commands as *disabled*. Also, if you are describing the appearance of an unavailable command or option, you can use *dimmed*, but not *grayed* or *disabled*.

Correct examples:

There are several unavailable commands on the **Edit** menu.

If the **Paste** command is unavailable, first select the text you want to paste, and then choose **Cut** or **Copy**.

The **Paste** command appears dimmed because it is unavailable.
A disabled control is unavailable to the user.

Incorrect examples:

There are several dimmed commands on the **Edit** menu.

If the **Paste** command is disabled, first select the text you want to paste, and then choose **Cut** or **Copy**.

The **Paste** command appears grayed because it is unavailable.

- Names of menus and menu commands are distinct elements on the screen. Do not combine the two names into one.

Correct example:

On the **File** menu, click **Open**.

Incorrect example:

Click **File Open**.

In general, mention the name of the menu the first time you refer to a particular command. However, if the location of the command is clear from the immediate context (for example, a topic about the Edit menu), you may not need to mention the menu name.

Correct example:

In Control Panel, click the **File** menu, and then click **Open**.

If the **Paste** command on the **Edit** menu is unavailable, first select the text you want to paste, and then choose **Cut** or **Copy**. You now should be able to choose **Paste** to insert the text in its new location.

In Windows, you open a submenu by *pointing* to the menu name.

Correct example:

Click the **Start** button, and then point to **Documents**.

On the **File** menu, point to **New**, and then click **Folder**.

Incorrect example:

Click the **Start** button, and then choose **Documents**.

On the **File** menu, choose **New**, and then choose **Folder**.

Types of menus

In end-user material, do not qualify the term menu with the adjective *drop-down*, *pull-down*, or *pop-up*, unless the way the menu works needs to be emphasized as a feature of the product. Shortcut *menu* is acceptable, however. Do not use any of these terms as verbs.

Correct example:

Open the **File** menu.

When you click the right mouse button, a shortcut menu appears.

Incorrect example:

Drop down the **File** menu.

When you click the **right mouse** button, a shortcut menu pops up.

Style of menu names and commands

- Always surround menu names with the words *the* and *menu* both in text and procedures.

Correct example:

On the **File** menu, click **Open**.

Incorrect example:

On File, click **Open**.
From File, click **Open**.

- In procedures, do not surround command names with the words *the* and *command*. In text, you can use "the ... command" for clarity.

Correct example:

On the **File** menu, click **Open**.

Incorrect example:

On the **File** menu, click the **Open** command.
On the **File** menu, choose the **Open** command.

- Do not use the possessive form of menu and command names.

Correct

The **Open** command on the **File** menu opens the file.

Incorrect example:

The **File** menu's **Open** command opens the file.

- Follow the interface for capitalization, which usually will be title caps, and use bold formatting. Do not capitalize the identifier such as *menu* or *command*.

Correct example:

On the **Options** menu, click **Keep Help on Top**.

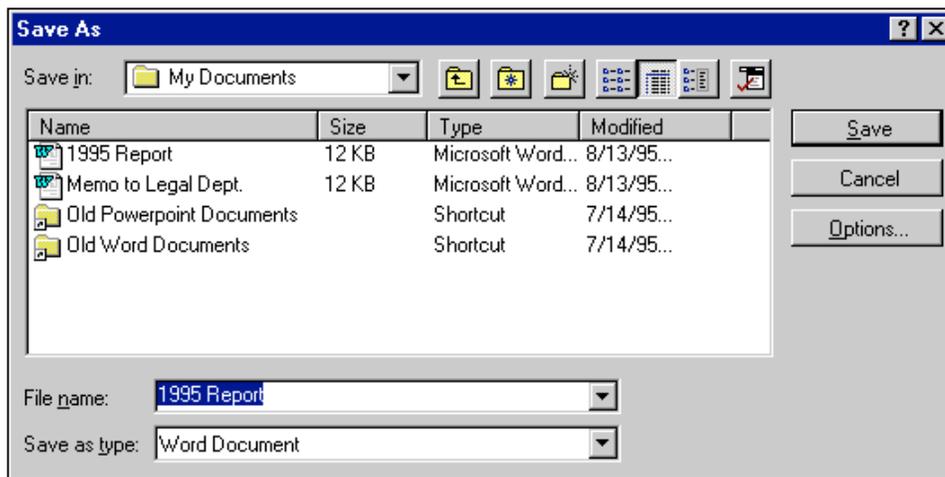
Incorrect example:

On the **Options** menu, click **Keep Help On Top**.

Dialog boxes and Property sheets

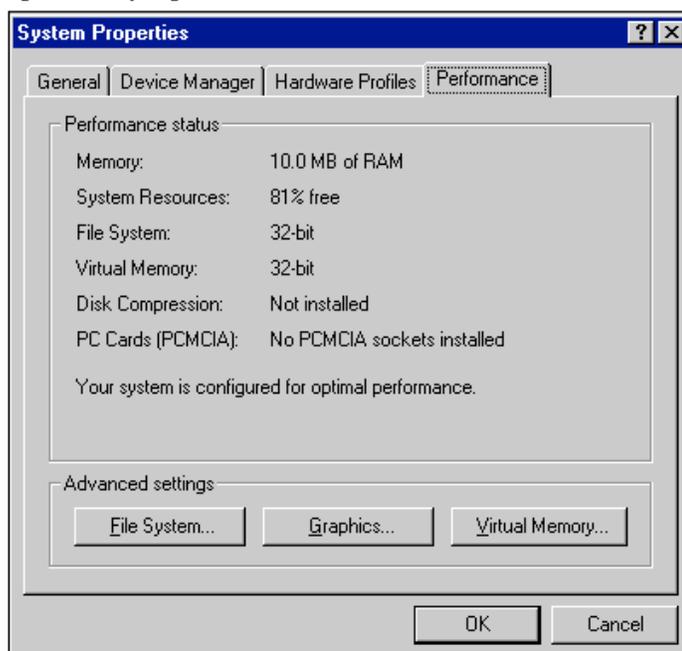
Dialog boxes contain command buttons and various kinds of options through which users can carry out a particular command or task. For example, in the Save As dialog box, the user must indicate in which folder and under what name the document should be saved. (Toolboxes are simply dialog boxes with graphical options that are treated in the same way as other options.)

Dialog box



Property sheets display information ("properties") about an object in the interface. For example, the Taskbar property sheet shows information such as the size of the Start menu icons and whether the clock is shown on the taskbar. Property sheets have command buttons and, when properties can be edited, they can contain options, as dialog boxes do. Both dialog boxes and property sheets can have tabbed pages that group similar sets of options or properties.

System Property sheet



Treat elements in dialog boxes and property sheets the same way. Avoid differentiating between *property sheets* and *dialog boxes* in end-user documentation. In general, avoid using the term dialog box or property sheet if you can and refer to property sheets as dialog boxes if you can't avoid a descriptor. Do not use the term *controls* in association with dialog box elements in end-user documentation.

Dialog box syntax

The following terms are most commonly used for user actions in dialog boxes:

- *Click*: Use for commands, command buttons, option buttons, and options in a list, gallery, or palette.
- *Select* and *clear*: Use for check boxes.
- *Type* or *select*: Use to refer to an item (as in a list box) that the user can either type or select in the accompanying text box. You can use *enter* instead if there's no possibility of confusion.
- *Choose* and *select*: Use these terms only when documenting generic procedures, not mouse procedures. Use *choose* for commands and *select* for options.

Except for the identifiers *box*, *list*, *check box*, and *tab*, the generic name of an item within a dialog box (*button*, *option*, and so on) should not follow the item's label, especially within procedures. *Check box* in particular helps localizers differentiate this item from other option boxes.

Only when associated with an action, Use bold for dialog box titles, labels, and options.

The following example shows typical procedure wording for dialog box elements.

Correct example:

To view bookmarks

1. On the **Tools** menu, click **Options**, and then click the **View** tab.
2. Select the **Bookmarks** check box.

Dialog box elements

In most documentation, especially for end-users, do not differentiate between elements such as drop-down combo boxes, list boxes, and so on. Do use the term *check box*, however. Use the correct label (for example, Save as type) with the term *box* or *list* if necessary to locate where the user should be and then direct the user to click, select, or take other action.

The following table describes the various elements that can appear in dialog boxes. In general, do not use the name of the particular element in documentation except in reference to designing interfaces. Use lowercase for the name of the element ("the **Spaces** check box"). In general, use sentence caps for the specific descriptor.

Element name	Definition	Usage
Check box*	Square box that is selected or cleared to turn on or off an option. More than one check box can be selected.	Select the Spaces check box. Click to clear the Bookmarks check box. Select the appropriate check boxes. Note: Always include <i>check box</i> with the label name.
Combo box	Text box with a list box attached. The list is always visible. Because users can either type or select their choice, you can use <i>enter</i> to describe the action. Follow your project style sheet.	In the Font box, type or select the font you want to use. --or -- In the File Name box, enter a file name.
Command button	Rectangular button that initiates an action. A command button label ending with ellipses indicates that another dialog box will appear: More information is needed before the action can be completed.	Click Options .
Drop-down arrow	Arrow associated with a drop-down combo or list box or some toolbar buttons, indicating a list the user can view by clicking the arrow.	Click the Size arrow to see more options.

Drop-down combo box	Closed version of a combo box with an arrow next to it. Clicking the arrow opens the list.	In the Size box, type or select a point size.
Drop-down list box	Closed version of a list box with an arrow next to it. Clicking the arrow opens the list. Depending on the type of list, use either <i>list</i> or <i>box</i> , whichever is clearer.	In the Item list, click Desktop .
Group box	Frame or box that encloses a set of related options. It is a visual device only. If necessary for clarity, you can use either under followed by the label or in the <i>[name of group]</i> area.	Click Small Caps . --or -- Under Effects , click Small Caps . --or -- In the Effects area, click Small Caps .
Label (do not use <i>caption</i>)	Text attached to any option, box, command, and so on. Refer to any option, box, and so on by its label.	In the Font list, click Arial .
List box	Any type of box containing a list of items the user can select. The user cannot type a selection in a list box. Depending on the type of list, use either <i>list</i> or <i>box</i> , whichever is clearer.	In the Wallpaper list, click the background wallpaper of your choice.
Option button (avoid radio button)	Round button used to select one of a group of mutually exclusive options.	Click Portrait .
Slider* (also called trackbar control in some technical documentation)	Indicator on a gauge that displays and sets a value from a continuous range, such as speed, brightness, or volume.	Move the (name) slider to the right to increase the volume.
Spin box (do not use spinner or other labels)	Text box with up and down arrows that the user clicks to move through a set of fixed values. The user can also type a valid value in the box.	In the Date box, enter or select the part of the date you want to change.

Tab* (also called <i>tabbed page</i> in technical documentation)	Labeled group of options used for many similar kinds of settings.	On the Tools menu, click Options , and then click the View tab. Note: Always include “tab” with the label name.
Text box	Rectangular box in which the user can type text. If the box already contains text, the user can select that default text or delete it and type new text.	In the Size box, select 10 or enter a new font size. In the Size box, enter a font size. Note: use <i>enter</i> if there's no chance of confusion.
Title (do not use caption)	Title of the dialog box. It usually, but not always, matches the title of the command name. Refer to the dialog box by its title when necessary, especially if the user needs to go to a new tab.	In the Options dialog box, click the View tab.
Unfold button	Command button with two "greater than" signs (>>) that enlarges a secondary window to reveal more options or information.	Click Profiles for more information.

* *Check box*, *tab*, and *slider* are the only terms in this table that should typically be used in end-user documentation.

More on capitalization

In general, use standard capitalization rules whenever possible. For example, common nouns are usually all lowercase and proper nouns are always capitalized. For most uses, follow these guidelines:

- Never use all uppercase letters for emphasis.
- Follow the capitalization rules or conventions of software or a specific product as necessary, as in case-sensitive keywords, for example.
- Do not capitalize the spelled-out form of an acronym unless specified otherwise in the “Other CCLA Naming Conventions” section of this guide.
- Avoid over-capitalization. The current practice is toward using lowercase unless there's a specific reason for capitalizing.

After consulting this guide, use *American Heritage Dictionary* as the primary reference for proper capitalization of specific words.

Capitalization of interface elements

The following general guidelines cover the basic capitalization rules as they apply to interface elements:

- Menu names, command and command button names, and dialog box titles and tab names: Follow the interface. Usually, these items use title caps. If the interface is inconsistent, use title caps.
- Dialog box elements: Follow the interface. Newer style calls for these items to use sentence caps. If the interface is inconsistent, use sentence caps.
- Functional elements: Capitalize the names of functional elements that do not have a label in the interface, such as toolbars (the Standard toolbar) and toolbar buttons (the Insert Table button). Do not capitalize interface elements used generically, such as *toolbar*, *menu*, *scroll bar*, and *icon*.
- User input and program output: Do not capitalize unless it is case-sensitive.

Always consult your project style sheet for terms that may be case-sensitive or traditionally all uppercase or lowercase.

See also Dialog Boxes and Property Sheets, Document Conventions, Menus and Commands in your online MSTP reference for more information.

Capitalization of titles and headings

Many books and Help topics now capitalize only the first word of chapter titles and other headings; design guidelines are less formal than in the past. The following guidelines represent traditional title capitalization standards. They are especially useful in answering questions about capitalization of adverbs, prepositions, verbal phrases, and the like. If your design does not use traditional capitalization, follow your design guidelines.

- Capitalize all nouns, verbs (including *is* and other forms of *be*), adverbs (including *than* and *when*), adjectives (including *this* and *that*), and pronouns (including *its*).
- Always capitalize the first and last words, regardless of their part of speech ("The Text to Look For").
- Capitalize prepositions that are part of a verb phrase ("Backing Up Your Disk").
- Do not capitalize articles (*a*, *an*, *the*) unless an article is the first word in the title.
- Do not capitalize coordinate conjunctions (*and*, *but*, *for*, *nor*, *or*).
- Do not capitalize prepositions of four or fewer letters.
- Do not capitalize *to* in an infinitive phrase ("How to Format Your Hard Disk").

- Capitalize the second word in compound words if it is a noun or proper adjective or the words have equal weight (*Cross-Reference*, *Pre-Microsoft Software*, *Read/Write Access*, *Run-Time*). Do not capitalize the second word if it is another part of speech or a participle modifying the first word (*How-to*, *Take-off*).
- Capitalize interface and program terms that ordinarily would not be capitalized, unless they are case-sensitive ("The fdisk Command"). Follow the traditional use of keywords and other special terms in programming languages ("The printf Function," "Using the EVEN and ALIGN Directives").
- In table column headings, capitalize only the first word of each column heading.

See also Lists, Tables in your online MSTP reference for more information.

Capitalization and punctuation

Do not capitalize the word following a colon unless the word is a proper noun or the text following the colon is a complete sentence.

Do not capitalize the word following an em dash unless it is a proper noun, even if the text following the em dash is a complete sentence.

Always capitalize the first word of a new sentence following any end punctuation. Write sentences to avoid the use of a case-sensitive lowercase word at the beginning.

Correct example:

The printf function is the most frequently used C function.

Incorrect example:

printf is the most frequently used C function.

Document conventions summary list

These are some of the most common document conventions for the Windows system. See also; Capitalization, File Names and Extensions, Font and Font Style, Key Names, Menus and Commands, and Dialog Boxes and Property sheets sections of the online MSTP for more examples.

Item	Convention	Example
Acronyms	All uppercase	CUA FIFO
A.M., P.M.	All uppercase	A.M., P.M.
Book titles	Title caps, italic	See the <i>Visual Basic Custom Control Reference</i> .
Chapter titles	Title caps, in quotation marks	See Chapter 9, "Extending Forms."
Command-line commands and options (switches)	All lowercase, bold	copy command /a option
Commands on menus and buttons	Bold; capitalization follows interface (usually title caps)	New Query button
Data types	Bold; case varies	<ul style="list-style-type: none"> • DWORD • Float • HANDLE
Device names	All uppercase	LPT1 COM1
Dialog box options	Bold; capitalization follows interface	<ul style="list-style-type: none"> • Click Close all programs and log on as a different user? • Find Entire Cells Only check box
Dialog box titles	Bold; title caps	Protect Document dialog box Import/Export Setup dialog box
Directories	Initial caps (internal caps are acceptable for readability)	<ul style="list-style-type: none"> • \\IRSTaxforms\Public • \\IRSTax Forms\Public
Error message names	Title caps	General Protection Fault
Extensions	All lowercase	.mdb .doc

Fields	Bold; capitalization varies	<ul style="list-style-type: none"> • IfHeight • Biplanes
File names	Title caps (internal caps in short file names are acceptable for readability)	<ul style="list-style-type: none"> • My Taxes for1995 • Msacc20.ini • MSAcc20.ini
Folders and directories	Title caps	<ul style="list-style-type: none"> • My Documents • Vacation and Sick Pay • \\Accounting\Payroll\Vacpay
Icon names	Bold; title caps	<ul style="list-style-type: none"> • Recycle Bin • In Control Panel, click Add New Hardware.
Key names, key combinations, and key sequences	All uppercase	CTRL, TAB CTRL+ALT+DEL SHIFT, F7 (brackets not used in MSTP)
New terms or emphasis (but note that italic does not always show up well online, so you can use quotation marks for new terms)	Italic	Microsoft Exchange consists of both <i>server</i> and <i>client</i> components. You “must” close the window before you exit.
Placeholders (in user input)	Italic	Type <i>password</i>
Programs and applications, including utility and accessory programs	Title caps	<ul style="list-style-type: none"> • Microsoft Word • Notepad
Toolbar button names	Usually title caps (follow the interface); bold	<ul style="list-style-type: none"> • Format Painter • Insert Microsoft Excel Worksheet
User input	Lowercase, bold	Type going home
Windows, named	Title caps	Help window
Windows, unnamed	All lowercase	document window

Other WBT style conventions

The following are style conventions that are more system specific, MSTP exceptions, or conventions that work best within the WBT delivery system. Some of these conventions may not apply to the Aleph LMS. More examples will be added to this section as we get more experience with designing instruction for the LMS system. The Communications group will help guide standardization, especially in our initial LMS courseware production effort.

MSTP exceptions

- **Using log in**

As an action type **Log in**

As a reference to the login screen type **Login**

User input or selections

Use bold font for user input, following any of the verbs;
type, enter, choose, use, move, clear, click, select, point,
double-click, or drop down

Do not bold words; menu, button, icon, window, box, tab, arrow, or slider

Company Usage and Formatting Conventions

The following list is always being updated and is posted on the comp intranet > Staff Resources > Office Tools > Style & Usage Conventions). It is recommend that you often check this reference. An effort has been made to align formatting conventions to the MSTP manual. If you find inconsistencies, adopt the following stated guidance.

Usage Conventions

- **Electronic Addresses** — Italics and lowercase. Do not break the address across lines; if necessary; begin the address on a new line. Use the preposition "at" with the location of a web address. For example:

E-mail — Web site — Visit the company website at xxxxxxxxx.

- **Aleph** — Initial caps, no italics.
- **Ask a Librarian** — Lowercase "a," no hyphens.
- **CD-ROM** — When referring to the disc itself, use CD-ROM (all caps), "compact disc," or "disc," not "disk." Do not use the redundant "CD-ROM disc."
- **Click or clicking** — Use "click" or "clicking" rather than "select" or "selecting" to refer to the user action of issuing a command or setting an option. Do not use "click on" or "click at." See *also*: **select** or **selecting**

- **Community college** — Both "c's" in "community college" lowercase unless proper. For example, "Brevard and Polk community colleges." If proper, then "Brevard Community College."
- Databases — Proper names of databases are in italics. For example:
- **Double-click** or **double-clicking** — Always hyphenate.
- **Drop-down menu** — Hyphenated; not "dropdown" or "drop down."
- **eBooks** — Lowercase "e," capital "B," no hyphen, and no italics. Note: There are variations of this term. xxxx follows Library nomenclature.
- **email** — Hyphenated. Note that use of a hyphen varies widely among organizations. Hyphenation is the CCLA standard.
- **Xx xxx**— Two words, initial caps, and no italics.
- **xxxxxxx** — One word in italics, capital "F" and "S."
- **Internet** — Initial caps. Refers to the worldwide collection of networks using TCP/IP protocols to communicate with each other. The term "internet" (lowercase) refers to any large network made up of a number of smaller networks. In general, avoid use of the lowercase term or define it so that it's not confused with the Internet.
- **Internet Explorer** — Always use "Microsoft Internet Explorer" upon first reference; afterwards use "Internet Explorer." Do not use "IE."
- **intranet** — Lowercase.
- **ISP** — Always spell out "Internet Service Provider" upon first reference; afterwards use "ISP."
- **LINCCFORUM** — One word, all caps, and no italics.
- **xxxxx** — One word, "xxxxx" in all caps and no italics, "Learn" in initial caps and italics.
- **xxxxxx** — One word, no italics, "xxxxx" in all caps, "Web" in initial caps.
- **Listserv** — One word, all lowercase except when appearing at the beginning of a sentence, in which case use initial caps (i.e., Listserv).
- **Log on** or **log off** — Use "log on" to refer to connecting to a network and "log off" to refer to disconnecting from a network. Do not use "log in, login, log onto, log off of, logout, sign off," or "sign on." Use "logon" only as an adjective, as in "logon password," not as a noun.

Correct examples:

Reconnect when you log on to the network.
 Some networks support this logon feature.
 Remember to log off from the network.

Incorrect examples:

You are prompted for your password during logon.

Log in before you start Windows.

Remember to log off of the network.

- **Mailbox** — One word.
- **Menu bar** — Two words, lowercase.
- **My Account** — Two words, each initial caps.
- **Library** — One word, no italics, capital "N" and "L."
- **On-screen** — One word, hyphenated.
- **select** or **selecting** — Use "select" or "selecting" to refer to marking text and cells that will be subject to a user action such as copying text or adding/removing a check in a check box. Do not use "highlight." See *also*: **click** or **clicking**.
- **Set up** (v), **setup** (adj, n), **Setup** (Program) — Note the usage according to the grammatical function indicated in parenthesis. For example:

Verb (v) — Have everything unpacked before you set up your computer.
Adjective (adj) — The setup time should be about 15 minutes.
Noun (n) — Your office setup should be ergonomically designed.
Program — Run Setup before you open other programs. Insert Setup Disk
- **Shut down** (v), **shutdown** (adj, n), **Shut Down** (command) — Note the usage according to the grammatical function indicated in parenthesis. Do not use as a synonym for turning off the power to a computer; instead, use it to refer to the process of quitting all programs before turning off the computer. For example:

Verb (v) — Shut down your computer before you turn it off.
Adjective (adj) — The shutdown procedure is simple.
Noun (n) — The accidental shutdown corrupted some files.
Command — To turn off your computer, select **Shut Down**.
- **Spring, fall, winter, etc.** — Seasons lowercase unless personified (e.g., "Old Man Winter").
- **Status bar** — Two words. Messages appear "on," not "in," the status bar. For example:
The page number is displayed on the status bar.
- **Toolbar** — One word.
- **Web** — Lowercase unless used at the beginning of a sentence.
- **web site** — Two words, lowercase.

Formatting Conventions

- Alphanumeric characters typed or entered into a field or after a prompt — use bolding. For example:

Select the **Host Name** field and enter **connect.altip.oclc.org**
At the prompt, type **Y**.

- Dialog boxes or windows — use italics. For example:

The *Authorization and Password* box appears.
The *Text Formatting* box is displayed.

- Figure captions — initial caps, italics, and bold. For example:

Figure 4.1: Company's Local Area Network (LAN)

- Font size — Use standard font and size now in use is Arial 11 pt. Use for committee reports, official correspondence and documentation. Please contact the Communications workgroup if you need assistance applying this standard to any official documentation.
- Keyboard shortcuts — To specify a key combination, use the plus sign between the keys to be pressed simultaneously. To specify a key sequence, use commas and spaces to indicate the sequence in which keys must be pressed. For example:

To undo the last action, press CTRL + Z.
To open a file, press ALT, F, O.
- On-screen commands and selections (i.e., commands on menus and buttons, fields, checkboxes, menus, etc.) — use bold. In general, if you are asking the user to click an item in a procedure, use bold and follow the interface for capitalization.

4. Graphics

As mentioned earlier, graphics creation and editing for WBT projects could be done with other company personnel support or acquiring company licensed software. Confer with the WBT project lead to establish your support request. There are guidelines that should be followed when building graphic files for the Web.

Screen capture size guide

Because of the nature of the Aleph application screen capture size will be based on a consideration of area to be captured or readability. It is preferred that the file should not exceed 800 x 600 pixels. Make your graphic the smallest size possible to compliment the viewing area of the D2L content frame or MS Word page format and easily read on a 1024 x 768 monitor screen. Refer to the next section on using SnagIt and be careful to set it up

File type

The “Gif” format is the standard for non-photographic material. Sometimes the .jpg format is ok and even better. Sample both to determine the best case for capture.

Color depth

Even though historically Web safe colors were limited to 256 (actually 216) to accommodate older systems, the High Color (16 bit) setting is fine for our WBT projects.

Instructional design considerations

Use as much graphics, charts, and tables as possible (picture = 1000 words). Use care to avoid cluttered graphics and insure a quality that would be easily read on a Web page. Make use of other resources such as previously developed material from other courses (PowerPoint, charts, etc.) and Aleph documentation.

For each unit of instruction provide the “Big Picture” view when possible. Lay the foundation with graphical concepts that can easily be caught.

5. Screen Captures

Getting the software

The WBT team has standardized on the TechSmith SnagIt software for screen captures. The current version is 7.2.4 (as of this writing). CCLA has purchased a Multi-user license. SnagIt is available on CD (from Org Tech group) for the initial installation. All updates and upgrades can be retrieved from the following TechSmith Website link or by using the SnagIt Help menu and choosing **Check for Updates**. We are licensed to install the software on 10 computers.

<http://www.techsmith.com/multidownload.asp>

This will take you to the TechSmith Multi-User Download Information and Links page. At the bottom of the page you should see “SnagIt Multi-User License or Upgrade (password required).” Click on the link. This is the access information you will need:

User Name: multiuser
Password: andromeda0521

Setting up the software

SnagIt has three parts; SnagIt, the screen capture utility, SnagIt Studio, a capture graphic enhancement application, and DubIt, for adding audio to your captures. You will not install the DubIt applet.

First, install SnagIt from the provided CD. After installation of SnagIt, it needs to be configured for your WBT project captures. You will setup SnagIt to default to a “region” capture mode saving to a .gif file with a preview before saving the file. The Hotkey options can also be set to something different from the default.

- Startup SnagIt
- Click **Image Capture** icon (left column)
- Click **Input** menu and choose **Region**
- Click **Output** menu
 - Select **File**
 - Select **Preview Window**
 - Select **Properties** (Output menu)
 - Click **Image File** tab
 - Select **GIF- CompuServe GIF** file format (use all defaults already set)
 - Click **OK** button (return to SnagIt Main view)
- Click **Options** menu
 - Choose **Program Preferences**
 - Click **Hotkeys** tab
 - Select your options for the Capture hotkey
(default is Shift+Ctrl+P)
 - Click **OK** (return to SnagIt Main view)
- Quit SnagIt

Capturing LMS screens for WBT (using SnagIt 7.0)

Step 1: Change your screen resolution (two methods)

Right click on your Desktop screen
Choose **Active Desktop**, then select **Customize my Desktop**
In the Display Properties screen click the **Settings** tab
Move pointer to **640x480** or **800x 600** whatever is appropriate (don't change Colors setting)

Or, Use the menus; Windows Start button> Settings> Control Panel> Display> Settings> 640x480> OK> OK>

Step 2: Bring up LMS and SnagIt

Login to LMS
Start SnagIt 7
Minimize SnagIt

Step 3: Capture LMS screen

- a. Maximize the **LMS** window.
- b. Proceed to your first screen for capture.
- c. Move cursor off screen (if not important to that screen)
- d. Use Hotkey keys (that have defined in the Setup procedure)
- e. Use cursors to move selection tool to upper left corner of desired screen capture area.
- f. Hold left mouse button and select entire area of screen then release left mouse button. It is very important to be consistent with your capture area size (pixels) for all screen captures throughout the project.
- g. SnagIt capture preview appears.
- h. Maximize or resize preview screen.
- i. If capture is correct> click **Save As**.
- j. Save file as the default type (.gif) using filename convention and appropriate folder.
- k. Close preview screen.

Step 4: Proceed to next Aleph screen and repeat sequence

Using SnagIt Studio

Use this application to add mark-ups and highlights to your screen capture to bring attention to specific screen areas of discussion. Use red arrows, circles, rectangles, or text to highlight an area of special attention. Be careful not to clutter the screen. Make sure your supporting text (Word document) matches the highlighted areas of the screen capture.

6. Building Demonstrations

Introduction

Presently WBT course demonstrations are built using Adobe Captivate. This tool is easy for the SME instructor to independently capture an animated realistic demonstration of all LMS screen activity for each WBT course lesson.

Remember that the demonstration that you build, in most cases, is supporting both a “guided” practice session and practice in the LMS training database (TD). The ultimate goal for the demonstration is to prepare the learner for the most success in practice environments as well as the real thing. Think backwards, first determine the practice session activity and then the demo capture. It is highly recommended that you rehearse your task scenario before attempting a capture with Captivate. It is easy to do re-takes, add or deleted parts to the whole, but it probably flow better if you don’t have to do that.

Captivate

We are using the first version of this product. It has been evaluated and determined that it would bring considerable benefits or advantages to our WBT development. Features of this tool include: spell checking, file importing, built-in graphic tools, and the ability to compile to a Macromedia Flash file format (.swf) delivered through the Internet browser Flash player (Shockwave technology) for learner display. These are all potential time savers for developing a quality-finished product. Captivate produces a nice GUI and higher quality audio narrations.

Obtaining and installing the software

The Captivate software is distributed through our Org Tech group or WBT project coordinator. Obtain the CD and follow the screen prompts for easy installation. Make sure you acquire the serial number, which is required for installation.

Since multiple SMEs and a developer would be using this product concurrently, it is suggested that all team member computers would have the same version installed. This safeguards against possible incompatibility issues. Versioning control will be important and will be coordinated by the WBT project lead. The vendor’s website will be checked often for updates and evaluated for company use.

Using Captivate

Here are the best practices and steps used to build WBT demonstrations installation is straightforward and is assumed for the rest of this “Using Captivate” section. However, there are some setup preferences or customization that should be done prior to starting the actual lesson demonstration capture. Many of these are done while stepping through the software dialogs or prompts to achieve the desired capture.

Several documents for learning the Captivate software are available on the “O” drive under WBT Projects>WBT Software Tools. A Captivate Training folder is there with help guides and examples. Refer to these documents for greater detail than presented here. The WBT projects coordinator also offers periodic classroom training. What is included in the following section only covers the basics of the primary steps to acquire a capture. Captivate refers to your application captures as “movies”.

Capture screens:

1. First start up the LMS session to be captured.
2. Launch Captivate.
3. On the Start Page, click Record or create a new movie. The New movie options dialog box appears.
4. Select Application and click OK. The Recording window appears.
5. In the Record specific window pop-up menu, select the application to record.
6. (Optional) Select Record narration to record audio as you record the movie.
7. (Optional) Click Options to set a wide variety of recording options, including the capability to automatically record the movie and automatically generate text captions.
8. (Optional) If necessary, change the size and position of the window. You can resize the window by selecting one of the sizing handles on the red frame and dragging it. To change the location of the window, move the mouse over the red frame until a four-point arrow appears, and then drag the entire window to a new position. You can also click Snap red recording area to fit select window to quickly change the size of the recording area to match the size of the application.
9. When you finish setting options, click Record.

10. Captivate begins recording the onscreen action.

- If you are automatically recording (that is, you selected the Enable Auto Recording option in step 7), Captivate automatically captures a screen shot every time you perform an action, such as selecting a menu, clicking a button, or typing text. Note: When you are auto recording, you can take a screen shot manually at any time by pressing the Print Screen key. This is particularly useful if you are capturing a website that contains many pop-ups, frames, and special effects that are sometimes not auto recorded. If you see a special effect or change take place on a web page you are recording, but do not hear the camera shutter sound, press Print Screen to take a screen shot manually.
- If you are manually recording (that is, you did not select the Enable Auto Recording option in step 7) press the Print Screen key (or other designated capture key) to capture screen shots. Use the application as if you were demonstrating your actions to someone. If you have sound enabled on your computer and the option is activated, you will hear a camera shutter sound when screen shots are captured. Note: When you record any onscreen action, it is best to perform the action more slowly than you would normally. For example, if you are recording keyboard action, type text slowly.

11. When you finish recording, press the End key (or other designated key) to end recording. The slides are generated and your new movie appears in the Captivate Storyboard view. If any drag-and-drop actions were recorded and full motion slides created, you will see the full motion slides displayed in Storyboard view with a movie camera icon in the lower right corner of the slide. Tip: If you need to pause recording, press the Pause/Break key. To restart recording, press Pause/ Break again.

Length (number of frames)

It is recommended that you limit the number of frames for each lesson to 30. Divide your subject matter into the shortest presentations as is practical. There is no absolute frame count. The main reason for limiting the length of your demonstration has to do with the delivery technology. These demonstrations are using Internet streaming technology. Client network bandwidth and other computer resources must be considered. The file size of each demonstration with audio narrations must be kept small for reasonable load times.

Use of Captions

Sometimes these text captions are referred to as “balloons”. Captivate offers several shapes and colors for text boxes (captions). Multiple captions can be placed on a screen but it is not recommended. Captions have two primary functions: actions and supporting comments or instruction. There should be a difference of shape and color used for these two types of captions. It is important to note that you can have multiple frames with the same screen. This would be a way to accommodate the need for extended actions and comments to a task.

Placement

Use care in balloon placement, placing it as close as possible. Be sure to use the style (pointer direction) appropriate to what screen area or element is getting the attention.

Characters

Maximum number of characters in balloon should be 20 (as is practical). This impacts the associated audio narration file size, and therefore downloading considerations. Follow MSTP style conventions for textual treatment, and use Arial 12 or 14 point font depending on the screen resolution used for the capture.

Color

Balloon color should be yellow for actions to be taken by the learner. Pink or orange would be used for providing supporting information. Since there are several shades of a color available, caution should be used to be consistent throughout the WBT course.

Shape

Balloon shape selection must be consistent throughout the WBT course. “Action” balloons would be a rounded shape whereas “Note” balloons for introductions, navigation hints and exceptions to processing rules are of a rectangle or square shape.

Capturing process best practice

Only capture the Aleph LMS application window(s). Do not include any parts of your computer desktop or Task bar. Before starting the capture process set your monitor screen resolution to 1024 x 768 pixels. This has been determined to best accommodate LMS screen behavior to account for all the active parts of an LMS window. You must be conscious of every little movement or action you make within an Aleph screen and the resultant system reaction. The Capture hotkey should be used very often to breakdown your screen activity into several frames. The better this is done, the more options you will have for the editing process. Sometimes it will seem very tedious but there is a payoff. Using hotkey separations between keystrokes for text entries will provide a more realistic playback of your demonstration. Working in the Windows environment, using menus, dialog boxes, and mouse movements will need to be carefully thought out before doing it.

7. Online Practice Session (using the Aleph training database)

Hands-on reinforcement to training.

Web-based course instruction will be supplemented and reinforced through online access to one or more training databases that replicate actual examples of library records. The training database(s) will be setup to mimic actual profiles and tables, thus affording the students a "real-world" environment in which to learn. Students will access the training database(s) from their desktop and from within the same Aleph client that they will use at STP (Switch To Production). The training database(s) will be reinstalled each weekend in order to clean up problems and transactions that have been left unresolved by the students, thereby presenting new students with a clean database with which to work.

Script development

The SME instructor will develop the necessary training procedural scripts. The Web-based scripts will parallel instructor-led training. These scripts will present examples of situations that the student will execute. Students will also be encouraged to go beyond the scripts to create their own transactions.

Institution-assigned ranges of titles, items and barcodes

In order to accommodate students from 28 different institutions using the same database(s), it will be necessary to set informal parameters and protocols for database use. This will minimize instances of students accessing and changing the same records. This will need further discussion once the actual makeup of the training databases has been determined, but one possible approach is to assign specific ranges of the alphabet to specific institutions. Thus, institution X might use borrowers and titles that begin with the letter A and institution Y might be assigned letter B, and so forth.

WBT demonstrations reinforcement

It is important to establish training database scripts that work hand-in-hand with each lesson demonstration provided in the WBT courseware. Lesson reinforcement is best accomplished if the "live" practice is segmented and correlated to organization of the WBT lesson plan. Some additional thought should be given on how to develop scripts that can be used across both training mediums, Instructor-led and WBT, with the minimum rewriting or re-packaging.

8. Building Assessments

Quizzes, tests, and exams are built first in MS Word files for the purpose of the review cycle. A MS Word template file is provided for the SME. The assessments are copied and pasted from the Word files into the D2L Assessment Manager. More details about the D2L Assessment Manager are covered in the “Using D2L” section of this guide.

Instructional design considerations

Test questions can serve many roles in courseware development and delivery:

- They can be used during delivery to verify that the course objectives have been met.
- They can be used to help determine deficiencies in skills, knowledge and attitudes in the target audience during courseware development.
- They can help you identify missing pieces of content in your content outline.
- They can help you determine the scope of your courseware project.
- They provide a guideline for elaborating on content during the later phases of development (such as storyboarding).
- They can be used in advance, as pretests, to determine whether someone needs to complete the training.
- Tests can help instructors and trainers see the emphasis of the courseware

Of all of these roles, the primary role of test questions is to find out if the learner learned what he or she was supposed to learn. By writing several questions for each objective, you can compare student performance against the performance objectives written during development. During the evaluation phase of the project, you can match test scores to objectives to see where deficiencies exist.

Multiple-choice questions

Writing a multiple-choice question and the correct answer is the easy part. On the other hand, writing a set of good foils (or distracters) can be fairly difficult. Be careful not to write distracters that could also be considered correct in certain situations. Distracters should consist of a reasonable set of incorrect responses. In order to reduce the level of guessing, it is recommended that you use at least 3 foils (2 distracters and the correct answer). The most popular format for multiple-choice questions is 4 foils (3 distracters and the correct answer).

True or false questions

True or False questions can be best used for assessing factual or rote learning. They are very useful for assessing learner abilities following a series of discrimination exercises (showing a series of examples and non-examples). One advantage for using this type of question is that tests are generally easy to construct. There are several disadvantages of using true/false questions. There is a higher level of probability that students could "guess" their way through a test. In addition, it is often difficult for the test writer to write questions that are not ambiguous. Test questions written in this format must have a clear answer. There can be no "gray" areas in writing a true/false question.

9. WBT Review Process

General

In tradition with company team structure, WBT course development has an extensive review cycle in place to exercise synergism among related workgroup and personnel expertise. Much of the formal review process will utilize MS Word and its master document and revision tracking features. All course files are reviewed from a central file server, providing an “on-line review” capability.

Reviews are done initially in a unit-by-unit phase as the SME instructor completes them. When all units have been reviewed, corrected/accepted, then an integrated review commences. The following sequence is used to conduct formative reviews of the courseware through all production phases:

1. SMEs review initial Unit set of files
2. SME instructor acceptance/corrections
3. Instructional design & editorial unit reviews
 - a. IDS
 - b. Communication group rep. review
4. SME instructor final acceptance/corrections
5. Integrated courseware review (from Blackboard)
 - a. SMEs
 - b. Website team
 - c. Comm. Group
6. Integrated courseware acceptance/corrections
7. LMS testing phase (integrated courseware)
by Data Applications group rep.
8. Alpha testing phase corrections/acceptance
9. Beta testing phase (staff review)
10. Beta testing phase corrections /acceptance
11. General release

Overview of the Unit review period

A MS Word master document is assembled from each unit’s individual lesson and assessment files. The master document provides a contextual view of all related instructional topics. The SME Instructor will notify the project lead in advance of a scheduled review period to create the master document. The master file is published from the WBT project folder (O: /projects/Web-based Training) on the server. The SME instructor will compile the comments from this initial review and then proceed to the next phase of review. The project lead will announce and coordinate the review period. There are two ways to offer corrections or suggestions to a MS Word document review. Either, write over existing text, or you can create a comment text box. The SME instructor will edit, reject, or accept changes and comments made after all reviewers are done. The following steps below will guide the reviewer and instructor in the details of working with the MS Word files.

Master document creation

1. Create a new blank document from established template found in the course Word folder. Rename the file to the appropriate unit placed in review.
2. View in Outline mode
3. In the Master Document toolbar, Click on **Insert Subdocument** icon
4. Insert each file in the correct order that you would move through the training. Find the file and click **Open**.
5. Save and close the Master document

Publishing for SME review

The WBT project lead Notifies SMEs. An E-mail is sent to SMEs with location of Master Document file and deadline for review completion. The SME reviewers are directed to use the edit process outlined in “Instructions for Editing WBT in Word.”

SME changes and comments

- The first review begins with SMEs.
- Use the edit process outlined in “Reviewer Procedures.”
- SME reviewers notify project lead of their completion of the unit review.

LSC instructor reviews the SME changes and comments.

- Use the edit process outlined in “Instructor Procedures.”
- Instructor Prepares for Editorial & Instructional Design (ID) review
Notify project lead for readiness of next review phase
Project lead sends e-mail to designated editorial reviewer with location of Master document file and deadline for review completion.
Reviews should use edit process outlined in
“Instructions for Reviewing WBT in Word.”

Editorial & ID changes and comments

- Use the edit process outlined in “Reviewer Procedures.”
- SME reviewers notify project lead of their completion of the unit review.

SME instructor reviews the editorial & ID changes and comments.

- Use the edit process outlined in “Instructor Procedures.”
- Instructor notifies project lead of their completion of the unit review and acceptance.

Reviewer procedures

Viewing a Master document

Open the Master document:

View in **Outline** mode

Click on **Expand Subdocuments** icon on toolbar.

Viewing in **Print Layout** mode is recommended
to see true page layout (fit).

Scroll down to check that all subdocuments are present and expanded.

Perform editing

When you update the Master document, the individual files are updated automatically.

Setting reviewer information

On the **Tools** menu, click **Options**,
and then click the **User Information** tab.

Type the name and initials you want in the Name and Initials boxes.

Activate the **Reviewing** toolbar:

View>Toolbars>Reviewing

Using the Reviewing toolbar

Activate the Reviewing toolbar: View>Toolbars>Reviewing

Click on icons for: Displaying, Accepting and Rejecting Changes

Adding changes or comments

Making changes

Set reviewer Track Changes configuration defaults the first time you

Check your settings: Tools>Track Changes> Highlight Changes

Select each check box

Click on **Options**, select the following:

In the Insert Text -- Mark drop down list box, choose **Underline**,

In the Insert Text -- Color drop down list box, choose **By Author**

In the Deleted text, -- Mark drop down list box, choose **Strikethrough**,

In the Deleted text, Color drop down list box, choose **By Author**

In the Changed Formatting -- Mark drop down list box, choose **none**

In the Changed Formatting -- Color drop down list box, choose **Green**

Now when you add text it will display in a different color while replaced text is converted to a strikethrough.

Making Comments

Insert Comments by selecting the text or item you want to comment on, or
click at the end of the text.

On the Reviewing toolbar, click Insert Comment icon OR on the menu, click
Insert/Comment

Make sure the highlight color is set to yellow

Type the comment text in the comment pane at the bottom of the screen.

Display the existing comments

Rest the pointer over text shaded with light yellow.

Screen Tip should display with the comment and the reviewer's initials.

View comments by using icons on the Reviewing toolbar

- a. Click **Next Comment** icon, or,
- b. Click **Previous Comment** icon.
- c. Locate a specific comment:

On the Edit menu, click **Go To**. In the Go To What box, click **Comment**.

In the Enter Reviewer's Name box, select the reviewer's name.

Click **Next** until you find the comment.

***Note:** If comments don't display, make sure "Screen tips" is activated: Tools/Options/View tab/ScreenTips check box.*

Instructor procedures

Viewing a Master document

Open the Master document:

View in **Outline** mode

On Outline toolbar, click **Expand Subdocuments** icon.

Viewing in Print Layout mode is recommended to see true page layout.

Scroll down to check that all subdocuments are present and expanded.

Perform editing

When you update the Master document, the individual files are updated automatically.

***Note:** Sometimes the automatic document lock is enabled when you expand the document. Click on the Lock Document icon on the Master Document toolbar to disable it.*

Using the Reviewing toolbar

Activate the Reviewing toolbar: View/Toolbars/Reviewing
Click on icons for: Displaying, Accepting and Rejecting Changes

Display the existing comments

Rest the pointer over text shaded with light yellow.

Screen Tip should display with the comment and the reviewer's initials.

View comments by using icons on the Reviewing toolbar

- a. Click **Next Comment** icon, or,
- b. Click **Previous Comment** icon.
- c. Locate a specific comment:
 - i. On the Edit menu, click **Go To**. In the Go To What box, click **Comment**.
 - ii. In the Enter Reviewer's Name box, select the reviewer's name.
 - iii. Click **Next** until you find the comment.

Note: *If comments don't display, make sure "Screen tips" is activated: Tools/Options/View tab/Screen Tips check box.*

Edit, reject or accept reviewer changes and comments

Click the light yellow text that's associated with the comment.

On the Reviewing toolbar, click **Edit Comment**.

Modify the comment in the comment pane at the bottom of the screen.

Delete a comment

Click the light yellow text that's associated with the comment.

On the Reviewing toolbar, click **Delete Comment**.

Word automatically rennumbers any remaining comments.

10. Using Desire2Learn (D2L) System

Introduction

The D2L System is the most recent system chosen to host company's WBT courses. D2L is a Web application and server dedicated to distance learning. The D2L server integrates all courseware components by hosting the MS Word files and assessments created by the SME instructor. The course lesson demonstrations will be launched from the D2L platform but reside in folders outside of the D2L file directory. Practice session scripts for the training database are also obtained from the appropriate section of D2L.

This section will not cover a lot of detail on the D2L course management system. Plenty of vendor generated documentation is available that covers all aspects of the system functions, administration, and user operations. This documentation is updated and downloaded on a regular basis and achieved on the WBT projects server.

Course setup

The D2L system administrator must initially setup the course (shell) for the instructor. The LSC instructor can easily setup their course in D2L by using its import function. However, here at this company, generally the sysadmin for D2L does all the course content transfer and integration to this delivery platform. A hierarchical system of unit and lesson headings will be established much like the course content outline that was used for initial courseware development in the MS Word format. Navigation buttons can be named and creation of supporting information to provide course functional areas. Links to all prepared lesson demonstrations and course assessments are provided.

It is important to note that all WBT development will be consistent with an established style guide for course layout in D2L. Further discussion will be necessary to define these guidelines as we work with the new features and function of D2L. An embedded help system for using D2L is provided to all users. There are additional system access and control links found available in the **My Admin Tools** window. This is not visible to the learner system profile.

Using Administrator Tools

In D2L, the **My Admin Tools** window is where the instructor or administrators have access to the tools to build a course, monitor system or course activity, or manage the user database. All sections and functions are accessible by a list of links that will direct you to specific tools and processes. The user with the instructor role will have access to all appropriate tool links. Depending on the assigned role of the user, several links may not be "live." The SME group, Service Desk and other selected company employees, have been given appropriate permissions profiles in the D2L system.

11. Using Streaming Media Technology in WBT

This section is TBD.

The company is presently conducting a Streaming Media Prototype project to determine viability of implementing this technology in WBT product development and delivery for future courses. This section will be completed as appropriate based on the project results.
