

Fortune 500 EDU Production Standards, Project Documentation: (ISD/ID) Instructional Systems Design Best Practices, Standard ISD Processes & ID Developer Procedures

Outline: Project & Publishing Requirements for ISD Team’s and Training Developers (-redacted version)	3
Producing consistent, top-quality, certified and SME-approved training materials.....	3
Documentation Processes for Quality, Consistency & Efficiency.....	3
Overview: What’s this Document about?	4
What isn’t this Document about?.....	4
Document Development Process Overview (email me) for full whitepaper	4
Standard Tools and Processes - Outline:.....	4
US format	5
Strict Versioning and Control Policies: Perforce Version Control.....	5
REQUIREMENT: DAILY AND WEEKLY FILE SERVER UPDATES	5
REQUIREMENT: Only the assigned team exam writer(s) should modify existing exam questions. No other Perforce users should ever attempt to modify the contents of this directory.	6
Development Process – 2 Week Life-cycles and Review Process.....	6
Defining Project Objectives: Tasks & Skills, Theory, Training Success & Performance metrics, Communications, Project Deliverables: & Assignments.....	7
Curriculum and Course Architecture Requirements: Curriculum Master, Project Content Master, Project and Documentation Architecture and Layout.....	8
Skills: Task lists, skills and assignments	9
Working with Applications:.....	9
FrameMaker, Templates, File Naming Conventions, images and requirements	9
REQUIREMENT: When applying a new FrameMaker template to an existing file	9
Project Sub-folder Hierarchy: FrameMaker Defaults	9
Filename Conventions: Chapters and Labs	9

REQUIREMENT: Words in the title	10
Examples: File and sub-directory naming conventions (redacted)	10
REQUIREMENT: Editing conditional text (redacted)	10
Integrating Slide Images w/Tools (PowerPoint, FrameMaker, Perforce)	10
Working with TIF Images, FrameMaker, Visio and Other Applications	11
Taking Screen Captures	11
REQUIREMENT: Save each screen capture in TIF format and select.	11
Saving Visio Images	11
Editing Screen Captures and Visio Drawings	11
Image Naming Rules	11
Inserting TIF Images into FrameMaker Files	12
Framemaker import image by reference:	12
Using Correct Style – The Chicago Manual of Style (15th edition), The Elements of Style, and the Microsoft Manual of Style for Technical Publications	12
Standard Style and Trademarks	12
Add Symbol only for each first-time instance of valid Trademark	13
Writing for Internationalization and ESL Professionals	13
English Language Style	14

Outline: Establishing Project & Publishing Requirements for ISD Teams and Training Developers (-redacted version)

Establishing and documenting education requirements, timelines and deliverables

- Define performance objectives for creating and sustaining lean, agile training and education systems for deploying education and training programs required by Fortune 500 customers.
- Document design goals for all project deliverables, and all requirements for student training and assessments
- Implement rigorous design and developer disciplines (best practices) and defined deliverables and deployment model(s) along with strictly defined processes for managing resources, change management throughout product development, deployment and sustaining operations.
- Adhere to requirements for Corporate and product internationalization standards for English and non-ESL speakers (e.g. objectives must directly target professional, international audiences).
- Adhere to requirements for publishing certified, SME-approved content, that is, certified training programs, publications and certified student assessments.
- Project definitions, objectives and requirements are defined to track and measure team and product performance. Performance measurements and project assessments for project deliverables and objectives occur every two weeks. All project completion milestones are evaluated, including team and process performance measurements and efficiency metrics.
- This document defines required developer processes, and describes detailed procedures for successfully completing all instructional designs and e-learning projects. It defines requirements for producing training materials and planning for team-based development and publishing.
- Successful dev-teams and projects produce consistent, top-quality publications and effective educational content. For certification programs, strict requirements defined and validated for deploying and maintaining training standards and best practices, student certification levels and advancement, learning assessments and quizzes for Fortune 500 companies, customers, IT personnel, datacenter students and audiences.

Producing consistent, top-quality, certified and SME-approved training materials

- Publish SME-approved best practices for publishing high-impact, consistent and accurate training content.
- Produce updated project documentation which reflects standard business practices.
- Identify all required instructional design developer tools, including system integration and teaming/developer processes.
- Implement standards for team-developer tools, project sharing and team management and aligned with standard practices, business policies and workgroup procedures.

Documentation Processes for Quality, Consistency & Efficiency

This document describes processes, methods and tools needed for developer teams (dev-team) to consistently produce top-quality publications for each training project.

- For each new project, follow these guidelines to consistently develop professional student and instructor materials and training manuals.
- This document specifies requirements for all training content, including designs and developer projects. It describes project management and reporting processes for all assigned works-in-progress, as well as all finalized documents which are organized in a standard sub-folder, or directory tree hierarchy.
- Each dev-team member and reviewer must know these standards for producing certified and approved textbook chapters and labs.
- Finally, this document explains how to integrate developer applications, and it outlines the authoring style to be used when creating or editing training materials.

Overview: What's this Document about?

- The process used to create documentation
- How we work with commercial applications such as Captivate, FrameMaker, Perforce, and Cornerstone LMS, among other standard applications, as required
- Style guidelines
- Department guidelines for formatting text
- How to write international and industry professionals, and ESL audiences (English Second Language)

What isn't this Document about?

This document isn't about:

- Developer skills – It's not about how to print a book or use the developer tools. It's not about creating project documents.
- As you'd expect then, it doesn't define how to electronically and physically transmit books to remote printing service bureaus, or how to use and operate commercial applications such as FrameMaker and Perforce.

Document Development Process Overview ([email me](#)) for full whitepaper

When producing textbooks and lab books for training courses, textbooks are printed in instructor and student versions using standardized applications and certified templates to complete ISD processes and produce all training deliverables throughout design, develop, deployment and sustaining processes.

Standard Tools and Processes - Outline:

- Write chapters and lab exercises in **FrameMaker** and then use the application to build books
- Illustrate documents with **PowerPoint** slides, **Visio** drawings, and **Snagit** for screen captures
- Edit screen captures in **Photoshop** or **Photoshop Elements**
- Use **Perforce** to provide version control for documents and illustrations
- Use **DevBug** to track the tasks assigned to a project, and to track bug reports and other comments filed against existing course material
- Use **Acrobat Professional** to create PDFs for sending to printer and distribution

- Use **Captivate & PPT** for design and storyboarding phases, animate complex processes, dissect a sequence of steps to be able to visualize repetitive sequences or deeply nested-operations, or exercising required computer and software application skills for certification training

(redacted) . . . please email Christopher.Dotson@yahoo.com for full whitepaper.

- Use **Captivate, Flash** for animations, e.g. visualizing complex tasks, depictions of detailed processes and algorithms with interactive learning sequences. Demonstrations and interactive labs, plus measured exercises and certified assessments for each chapter, and automated course completion certificates
- Use prescribed filename conventions, as specified for each application type shown, below

(redacted) . . . please email Christopher.Dotson@yahoo.com for full whitepaper.

US format

Documents are to be developed in US format, using templates that also work with A4-size paper. A4 books are generated as needed during the booking procedure, which takes place after documents have been created and reviewed. As a writer, you do not need to be concerned about the differences between US and A4 formats.

Strict Versioning and Control Policies: Perforce Version Control

Perforce supports formal version control for most of writing projects.

Authors must verify read/write access to each assigned project document using their assigned network login credentials for accessing Perforce.

Documents that are maintained using Perforce for version control are stored in a database on `perforce.company_name.com:1666` (you need Perforce client to access it). Perforce uses a directory tree on each computer that runs the application.

******* WARNING: REDACTED VERSION - PRODUCT DEMO ONLY *******

Note - [Email me](#) directly to obtain my [full Whitepaper](#):

REQUIREMENT: DAILY AND WEEKLY FILE SERVER UPDATES

With Perforce, local PC files work must be carefully managed by the owner of each document while the Perforce file status is “locked” to other team members.

The owner must always ensure the most recent update of the file is maintained on Perforce, on a daily or weekly schedule, as determined by the dev-team managers and stakeholders.

The owner is expected to check-in documents once a day to the server.
For slow network connections, check-in documents after-hours.

Project Folder Hierarchy

The directory tree contains an organized collection of sub-folders which contain all project planning documents, document and application templates, work-in-process and edited FrameMaker files, PowerPoint slides, image files and source material.

(redacted) . . .

Example: Performce project directory tree: Project-xyz-201-v23:

The chapter-name subdirectory contains a separate subdirectory for each chapter, divided further into the following subdirectories:

(redacted) . . . please

REQUIREMENT: Only the assigned team exam writer(s) should modify existing exam questions. No other Performce users should ever attempt to modify the contents of this directory.

(redacted) . . . please email Christopher.Dotson@yahoo.com for full whitepaper.

Development Process – 2 Week Life-cycles and Review Process

These project cycles ensure each courses developed and deployed provide continue to provide thier maximum value to target audiences, including end-users and user-types, and customers. Full reviews occur during each two week cycle with the goal of providing statu and information to all stakeholders, SME's and Product Managers, and to ensure all objectives and course materials remain aligned with high and low level requirements for training deliverables. Requirements and specifications are adhered to, as specified within company specifications available from product-engineering and marketing communications, and other organizations and company standards.

Process Scope & Deliverables Requirements: Bi-weekly actions and deliverables

Before beginning work on any new or updated material, there must be clearly defined performance objectives and list of project deliverables, as approved by assigned dev-team members and stakeholders.

Goals and performance objectives for all project skills and tasks are clearly define for each book, chapter, lab, and information supplement. All information products and training materials are defined, and review and approvals are required by all stakeholders, along with comprehensive. . .

(redacted) . . . please email Christopher.Dotson@yahoo.com for full whitepaper.

Defining Project Objectives: Tasks & Skills, Theory, Training Success & Performance metrics, Communications, Project Deliverables: & Assignments

Assigned Project Tasks and Skills Requirements

For each certified product set, project documentation defines assignments for each task. Matching assignments appear on the List of Skills required to complete each project which reflect the SME best practices, along with requirements and instructions for each of the tools needed to successfully perform specified operations. Advanced requirements define.

(redacted) . . .

Theory of operations

Instruction that helps students attain high proficiency levels when using or executing business processes, selecting product functions, and when reporting at basic and advanced levels. Operational guidelines and training organized hierarchically, towards ever increasing complexity, from basic to advanced examples, best practices for designs, deployments and operations, as needed to achieve the full list of performance requirements. Successful projects provide specific results, performance requirements over a wide range of operating conditions and appropriate limitations, as end users and systems must often remain fully operational, with nearly-zero downtime for applications (i.e. highly available deployments and platforms).

(redacted) . . .

Project performance and Training Success Metrics

Measuring Training performance requires performance metrics which are identified early in product life cycle, including approved business processes and operational theory, and defined sets of performance objectives.

(redacted) . . .

Business, Product Management and Marketing Communications:

Messages from Product management and Marketing, for example, are regularly and targeted directed to specific audiences, including classified and public information. For example product status, information updates, or training and marketing messages designed for reinforcing value-added product features and benefits, such as detailed use cases, configuration and specifications which demonstrate key market positioning of each product.

(redacted) . . . please email Christopher.Dotson@yahoo.com for full whitepaper.

Curriculum and Course Architecture Requirements: Curriculum Master, Project Content Master, Project and Documentation Architecture and Layout

(redacted) . . .

Chapter and Lab objectives and completion requirements

Scope for each chapter and lab must be presented within a framework of top-level objectives, for example, demonstrating how benefits and features of processes and products align with over arching company objectives for Enterprise, Departmental, and each Group or Dev-team.

All objectives must be approved and final project deliverables are certified by SME's and stakeholders for each Chapter and Lab.

Each chapter and lab begins with clearly defined objectives. Primary goals are identified and status is reported for each dev-team, detailing all dev team actions and status of deliverables.

Objectives are written from a student/customer perspective and emphasize benefits when deploying products successfully alongside professional services and 3rd party vendors. For training projects, objectives demonstrate the value and positive outcome of a successful student performance as they complete the training curriculum (e.g. demonstrate both how to use the function and the rationale for completing each task in the prescribed manner, aiding student comprehension, training and troubleshooting).

Completion requirements should specify what needs to be accomplished, and which measurements obtained before each task is successfully completed . . .

(redacted) . . .

REGULAR TWO-WEEK REVIEW CYCLE: All Project Deliverables (full review)

Short, tight release schedules are expected requirements for delivering technical product training and certified documentation.

Many documentation projects operate on a very tight schedule. In such cases, the Technical Writing Manager might choose to condense operations of the above process.

Skills: Task lists, skills and assignments

(redacted) . . . please email Christopher.Dotson@yahoo.com for full whitepaper.

Working with Applications:

This section developer skills and project requirements when integrating other Enterprise applications used to create and support training curriculum, including source materials, content, and other deliverables.

FrameMaker, Templates, File Naming Conventions, images and requirements

(redacted) . . .

Integrating & Developing with FrameMaker

Use FrameMaker Template for “new” file

When writing a new chapter or lab, begin by locating and utilizing the correct FrameMaker template . . .

(redacted) . . .

REQUIREMENT: When applying a new FrameMaker template to an existing file

When applying a new FrameMaker template to an existing file, if you select all the Import and Update options, . . .

(redacted) . . . please email Christopher.Dotson@yahoo.com for full whitepaper.

Project Sub-folder Hierarchy: FrameMaker Defaults

The directory tree consists of sub-folders or sub-directories forming a hierarchy for course materials. Each sub-directory contains different templates for each textbook and lab book.

Filename Conventions: Chapters and Labs

When you save your work in FrameMaker, follow this convention for naming files:

title-us.fm, in all lowercase.

REQUIREMENT: Words in the title

Words in the title should be separated by hyphens, not underscores or (redacted) . . .

Examples: File and sub-directory naming conventions

(redacted) . . .

Conditional Text

(redacted) . . .

REQUIREMENT: Editing conditional text (redacted) . . .

Integrating Slide Images w/Tools (PowerPoint, FrameMaker, Perforce)

All training textbooks, chapters and labs are typically illustrated using Product Marketing and Product Engineering PowerPoint presentations, Word documents, and PDF's. Source documents are approved by dev-team project leaders, before they are used to create training materials and class presentations.

Slides are stored in the **images** subfolder of the specific chapter or lab folder (redacted) . . .

Create the slides using the correct **PowerPoint** template, then copy and paste each slide into the FrameMaker document, as follows:

1. Open both the PowerPoint file with the slides to be copied, and open the FrameMaker file into which the slides will be pasted.
2. In the PowerPoint file, select the thumbnail of the first image and copy it.
3. In the FrameMaker file, select the anchored frame at the top of the page where the image will appear.
4. From the FrameMaker menu bar, select Edit > Paste Special > Linked Microsoft PowerPoint
5. Slide Object, and then click OK. The slide image appears in the anchored frame.
6. In FrameMaker, display the Tools palette by clicking on the triangle icon on the right side of the application window.
7. In the Tools palette, change the width of the line from .5 to 1. Click first on the Number, and then select the second-thickest line.
8. Make sure the slide is selected.
9. In the Tools palette, click the Pen Pattern tool, and then click the solid black option.
10. Position the slide carefully near the upper, left edges of the anchored frame.
11. Repeat steps 2 to 10 with each remaining slide.
12. Save work-in-progress files regularly using permanent storage (i.e. local disk) storage systems. Regular, incremental file saves during development processes can prevent data loss between developer versions (i.e. prevent work-/data-losses due to slow networks, system crashes, etc.).

Working with TIF Images, FrameMaker, Visio and Other Applications

Although nearly all images in textbooks are slide images, some images are screen captures. To make and insert screen captures, follow the steps in the section below .

(redacted) . . . please email Christopher.Dotson@yahoo.com for full whitepaper.

Taking Screen Captures

Carefully examine each screen capture for usability, readability and aesthetics to ensure a good quality image will be replicated or printed properly. It is a good idea to adjust the browser to a size which displays the Management Console as a compact image. However, do not make the browser too small: The size should be comfortable for users

REQUIREMENT: Save each screen capture in TIF format and select. . .

(redacted) . . . please email Christopher.Dotson@yahoo.com for full whitepaper.

Saving Visio Images

(redacted) . . .

Editing Screen Captures and Visio Drawings

Once you have captured an image, save a copy of the original source image in the images subfolder before making edits. Use Photoshop or Photoshop Elements to edit a copy and save the file using a new image name, as needed. For example, the source image might need to be cropped or you may need to add other graphics, such as labels, arrows or circles for features described in text or to highlight specific areas of the image.

Saving the original source image enables different versions of the same image to be created, and easily tested or replaced, as necessary.

Always create a subfolder in the chapter or lab images folder for storing source images.

(redacted) . . .

Image Naming Rules

When you save your images, follow these file naming conventions:

1. . . . and choose a name that makes it clear to other members of the training team which part . . .
2. . . . and do not number screen captures sequentially . . .
3. . . . and do not add the name of the course (for example, . . .
4. . . . and do not add the version number to the filename (for example, . . .
5. By default, always configure settings for image-editing applications . . .
6. The filename of your TIF file should match the page name of the corresponding . .

- Correct: network-agent.tif
 - Incorrect: network-agent -fixed.tif or network-agent -new.tif
7. . . . and each image in a Visio tab should correspond to exactly one TIF file . . .
 8. . . . and always maintain the Visio source file, that is, each individual Visio file . . .

(redacted) . . . please email Christopher.Dotson@yahoo.com for full whitepaper.

Inserting TIF Images into FrameMaker Files

Edited images are imported into FrameMaker files by reference. This method prevents the size of files from growing larger than necessary. Importing by reference also allows you to edit the image and have the edits appear automatically in the document into which the image was imported.

The procedure below assumes that the image will appear in the document immediately following the text which introduces the image.

FrameMaker import image by reference:

(redacted) . . .

Using Correct Style – The Chicago Manual of Style (15th edition), The Elements of Style, and the Microsoft Manual of Style for Technical Publications

Standard style guides must be adhered to including The Chicago Manual of Style (15th edition) for general English use, except for some exceptions which are described later. Use The Elements of Style and Webster’s Collegiate, unabridged, or online dictionary. The online version is at www.m-w.com. For technical usage, follow the Microsoft Manual of Style for Technical Publications.

REQUIREMENT: US standard for spelling

Set your xxx settings . . . (redacted) . . .

Standard Style and Trademarks

(redacted) . . . please email Christopher.Dotson@yahoo.com for full whitepaper.

Use only Validated Trademarks and Validated Registered Trademarks

First, in order to legally protect a company’s intellectual property it is extremely important that all customer and corporate trademarks be validated from the associated company web site before adding a trademark symbol to any training document.

For each chapter or lab, trademarks must be properly identified as trademarks or registered trademarks.

Documents cannot claim trademarks for terms that are not actually trademarked. Only validated trademark names and terms must be used in each document. For existing documents, delete all false trademark claims within the document. For example, false trademark claims or incorrect terms can appear whenever new, expired or updated trademarks exist for the same company or product name.

(redacted) . . .

Add Symbol only for each first-time instance of valid Trademark

(redacted) . . .

Writing for Internationalization and ESL Professionals

(redacted) . . .

Be precise and simple when using new terms and use cases and examples

(redacted) . . .

Avoid using contractions

(redacted) . . .

Do not use gerunds that might be mistaken for adjectives.

For example, avoid Understanding in headings. We can have an understanding (adj.) friend, an understanding (adj.) parent, and so on. (redacted) . . .

Use active voice as much as possible.

(redacted) . . .

Use “condensed” language, concise sentences

Use “condensed” language, concise sentences that do not use words other than those needed to convey the message.

Throughout each document, use consistent naming for terms, actions or objects

(redacted) . . . please email Christopher.Dotson@yahoo.com for full whitepaper.

Avoid using slang, jargon, and undefined acronyms.

(redacted) . . .

Avoid non-English words

(redacted) . . .

Do not use spellings from non-American English dialects

(redacted) . . . (redacted) . . .

English Language Style

(redacted) . . .

Numerals

- Write out zero through nine unless the number precedes a unit of measure.
- Use numerals for 10 and larger numbers, unless the number begins a sentence.

Punctuation (redacted) . . .

Periods

Commas

Apostrophes

En and em dashes

Most U.S. style guides — including Microsoft and Chicago — say not to put a space on . . .

Colons

Hyphens

Quotation Marks

Capitalization

In general, these elements follow up-style capitalization, which capitalizes every major word and prepositions of five or more characters:

- Chapter titles
- Section titles (at all levels)
- Titles of PowerPoint slides
- In general, all other elements do not use up-style capitalization. Examples include:
 - Slide and figure captions
 - Text lines of PowerPoint slides, at all outline levels
 - Identifiers on Visio drawings

(redacted) . . .

Miscellaneous English Style Issues

- Avoid sentences with many different clauses. Such sentences often can be made
- easier to understand if you break them into separate sentences.
- Use short paragraphs instead of long ones. Most of the time, long paragraphs can be

- divided. Users are able to read and understand short paragraphs better than long
- ones.
- Use simple rather than complex verb forms:
 - Could be better: The system has been considerably improved since Release 1.
 - Better: System 2 is considerably better than System 1.

(redacted) . . . please email Christopher.Dotson@yahoo.com for full whitepaper.