eLearning Standards and Style Guide

Project

Month 20YY

Version X.XX

Company Information

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# Introduction

*[Introduce the purpose and scope of the guide, such as all courses for a particular curriculum. You can also include names and links to any additional templates used in the project. Examples throughout this template, such as use of U Perform software tools should be modified according to the tools and conventions applicable to your team]*

This document is for online course developers working on the [project name] courses. The document includes standards and best practices to ensure consistency among all modules and courses. All module and/recording files are created using the [name of templates] and the UPerform software.

# Document History and Revisions

*[Use this section to list version numbers and changes to make it easy for team members to find new material. You can remove or add columns based on your content needs.]*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Date | Version Number | Changes | Made By | Reviewed/Approved By |
| 3.8.2015 | v1.0 | Initial Draft |  |  |
| 3.10.2015 | V2.0 | New terms and acronyms added |  |  |

# Courses

*[If you know the number of courses within your project and their names, list them here, along with any specifications that might help developers. You can also list details about the audience profiles, purchasing or download options, etc.]*

This program consists of three courses, Introduction, Deep Dive, and Practice. Each course contains three modules and a final assessment.

# Development Timeline and Delivery Dates

*[List any pertinent details about the timelines for development, milestone dates that require submission, etc.]*

The development timeline is March-August 2015. Milestone delivery dates will be determined, and will be broken into storyboard, module, and final deliverable.

# Roles and Responsibilities

*[List the roles and responsibilities for all team members, which may include instructional designers, developers, and subject matter experts (SMEs).]*

## Instructional Designer

* Meet with SME to help validate objectives and map previous content to new instructional model.
* Create module in uPerform using the Instruction Model as your guide.
* Create, test, and publish recordings.
* Publish and review course.
* Work with SME through the review cycle making the appropriate edits.
* Create zip package of recordings and course file as the final deliverable.
* Check-in final course files to uPerform server. (Files should also be checked-in nightly.)
* Create course syllabus.

## Subject Matter Expert

* Validate objectives for each module.
* Review content to ensure accuracy.
* Supply application images for conceptual pages as requested by course developer.
* Review course and simulations. Use the annotations feature in uPerform to indicate required edits.

# File Naming Conventions

*[Use this section to list the file naming structure for each type of file you are using in the course development.]*

|  |  |  |
| --- | --- | --- |
| File Type | Style | Example |
| **PowerPoint storyboard** | courseinitials\_version\_mod#\_title\_storyboard | intro\_8-0\_mod1\_introduction\_storyboard |
| **Module file name** | **courseinitials\_version\_mod#\_title** | **intro\_8-0\_mod1\_introduction** |
| **Simulation file name** | courseinitials\_mod#\_title | intro\_mod2\_using\_chat\_feature |

# Properties

*[Use this section to list the standard properties you are using in the course development.]*

| Property | Style | Example |
| --- | --- | --- |
| **Title** | [Course Title and Release Number]: Title | Introduction to Service Desk |
| **Course Code** | [List code with capital letters and no space before the number] | SD100 |
| **Description** | [Provide a sentence or two to describe the course] | This course introduces the Service Desk application and provides steps for logging into the system. |
| **Release/Version Number** | [List release and/or version number] | Release 8.0.0, Version 1.0 |
| **User Roles** |  |  |
| **Copyright** |  |  |

# Review and Delivery Process

*[List job titles and/or names as appropriate when you need to send storyboards, modules, and finished products to a product manager, project manager, team members, and more.]*

When a module is ready for review, upload the file to the SharePoint site and inform [name/title].

# Stencils/Page Layouts

*[Based on the software application you are using to develop and publish your eLearning courses, you can modify this section to include screen designs, images, and more.]*

|  |  |  |
| --- | --- | --- |
| Page Type & Stencil | Format and Writing Style | Example |
| **Title**  Standard-Half-Bottom, 65% split, centered | In Course pane, list the module number: Module ##  Use module number and name style from source content as the image (see title image to the right).  Nothing in the heading area.  List the module objectives in text area. Use the corresponding audio file. | Module 01 |

|  |  |  |
| --- | --- | --- |
| Page Type & Stencil | Format and Writing Style | Example |
| **Welcome**  Standard-Half-Bottom, 80% split, centered | The "Welcome" page is only included in the first module of each course.  In the heading area, the text is "Navigating this course."  The body text is attached in the Welcome page text document to the right. | **Navigating this course**  This course introduces you to the system functionality. You will learn how to perform various tasks from the perspectives of a change coordinator, change manager, release manager, approver, and various support staff roles.  This course includes an end-of-course assessment. While you can take the assessment at any time, we recommend that you complete the entire course prior to taking the Course Assessment.  **Note:** There is no audio for this screen. |
| **Lesson**  Create a lesson folder with Standard-Half-Bottom stencil, 65%, centered | Use lesson style from source content as the image (see lesson1 image to the right).  Nothing in the heading area.  Copy/paste the objectives into notepad to remove formatting or set to normal in uPerform. Use the corresponding audio file. |  |
| **Content pages**  Standard-Half-Left, Standard-Half-Bottom,  Standard-Image | Try not to use the same text in the Course pane and the content heading area because the published output will show it twice. Also avoid using multiple colons (:) in the Course pane area.  If there is no audio, include text to say "**Note**: There is no audio for this screen."  Images should be left aligned unless otherwise specified. | Course pane: Requester role example (sentence case)  Content heading area:  Requesting an application upgrade |

|  |  |  |
| --- | --- | --- |
| Page Type & Stencil | Format and Writing Style | Example |
| **Simulation**  Simulation-Half-Right | Grab text from source materials to explain what the simulation is about. Then follow with this text:  The simulation will open in a new browser window.  Click the button below to launch the simulation.  **Note**: There is no audio during the simulation.  Use the begin\_simulation image to the right. | Course pane: Changing profile and preferences simulation (sentence case)  Content heading area: Using supplemental features (sentence case) |
| **Knowledge Check Introduction**  Standard-Half-Right stencil, 35% split | In the Course pane area, the text is "Knowledge Check." In the heading area, the text is "Introduction."  Some lessons contain more than one knowledge check, so the launch page text can vary. See document to the right.  Use the question mark image to the right. | Welcome to the final assessment. The assessment contains 50 questions that will test your understanding of the concepts and processes discussed in this course.  **Note:** There is no audio during the final assessment.  Click **Continue** start. |
| **Knowledge Check Questions**  Page type depends on the question type | In the Course pane area, the text is "Knowledge Check #.#" The first number corresponds to the lesson and the second number corresponds to its order within the knowledge check (i.e., question 1, question 2). The question text can be copied/pasted from Word files. Use the custom feedback from Word files but start with "Correct." or "Incorrect."  If there is more than one knowledge check in a lesson, the numbering varies (second example to the right. | Knowledge Check 2.1  Knowledge Check 1.1.1, 1.1.2, 1.1.3, 1.2.1, 1.2.2, 1.2.3  Hotspot question stems need ", then, click **Continue**." |
| **Summary**  Standard-Image | Create an image using the text from the source files and the PPT file to the right. Left align the image.  Use corresponding audio file. |  |

|  |  |  |
| --- | --- | --- |
| Page Type & Stencil | Format and Writing Style | Example |
| **Course closing**  Standard-Half-Bottom, 80% split | The "Course closing" is placed only in the final module for each course, directly before the assessment. In the Course pane area, the text is "Course closing."  Nothing in the heading area. The body text is in the document to the right.  DO NOT use the audio file because the navigation instructions do not apply. | You have now completed the [] course. Thank you for your participation.  Your next step is to take the final assessment.  **Note:** There is no audio for this screen.  Click **Next** to start the final assessment. |
| **Assessment**  **Introduction**  Standard-Half-Right, 35% split | The final course assessment is placed only in the final module for each course. In the Course pane area, right-click and select "Edit Assessment." Then click the "Select questions from a question pool" check box and set the number to 50. The question text can be copied/pasted from Excel files. Use this custom feedback "You selected the correct response" or "You did not select the correct response."  In the Course pane area, the text is "Final Assessment." In the heading area, the text is "Introduction."  Use the image to the right. |  |
| **Assessment**  **Questions** | In the Course pane area, the text is "Final Assessment #.#" The questions are randomized, so the numbering doesn't matter to the learner. | Final Assessment 1.1, 1.2, 1.3, 1.4, 1.5 |

# Writing Style

*[Use this section to provide guidance on the expected writing style and formatting for course materials, including when to use bold or italics for emphasis, the preferred capitalization style, and a focus on active voice. As applicable, reference organizational writing and style guidelines, including preferred authoritative sources]*

For this project, the content has been vetted, so only minor alterations to the text are allowed (e.g., changing a capitalized job title to lowercase). Do not alter the transcript text because it matches what is spoken in the audio files, which are not going to be re-recorded.

Bold is used to emphasize main points. Below are lists of some common formatting and UI elements.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Type | Font | Size | Style | Color | Line spacing | Example |
| Headline | Verdana | 24-pt | Regular | RGB: 79, 129, 189 | Paragraph spacing: 10-pt after  Line spacing: Multiple at 1.15 | Headline |
| Headings | Calibri | 14-pt | Bold | RGB: 0, 128, 0 | Paragraph spacing: 0-pt before and after  Line spacing: Multiple at 1.15 | **Heading** |

|  |  |
| --- | --- |
| Type | Example |
| **Button** | Click the **Save** button. |
| **Icon** | Click the **Calendar** icon. |
| **Link** | Click the **Asset Console** link.  Click the **4** link. (Example of what to write when there's a calendar date.) |
| **Text Entry** | Click the **Title\*+** text box.  Type **Web Report** in the **Title\*+** text box. (When the user has to type a lot of text, right-click the action, select "Edit Action," and condense the text in the "example text" field.) |

For guidance on how to name UI elements, consult the [Microsoft Manual of Style].

Materials must conform to organizational branding standards. [Link]

# Terminology and Acronyms

*[List all corresponding terms, acronyms, and usage guidelines in alphabetical order.]*

|  |
| --- |
| A |
| ADDIE - Analyze, Design, Develop, Implement, Evaluate |
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