xerox

Assignment 4
Instructional Design for Conversion of Legacy FrameMaker Documentation to the new Xerox Branding

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Introduction

This document is a continuation of Assignments 2 and 3 in the instructional design process. It contains:

- data gathered from the one-to-one sessions
- revisions to the training based on the one-to-one sessions
- data gathered from the group sessions
- revisions to the training based on the group sessions
- appendices which contain the documentation used for all sessions

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One-to-One Evaluation

1

The one-to-one evaluation process was designed to "identify and remove the most obvious errors in the instruction and to obtain initial performance indications and reactions to the content by learners."[1] The sections that follow describe the process and findings for this evaluation.

Participants

Three co-workers participated in the one-to-one evaluation. They were selected based on whether or not they had already performed branding conversions.

Learners	Mike	Orilee	Dave
Type	FrameMaker Expert	FrameMaker Expert	FrameMaker Expert
FrameMaker Experience (Years)	6	10	12
Selection rationale	Mike has had to perform conversions on three legacy documents manually. Has used both Structured and Unstructured FrameMaker	Orilee is a manager of one of the authoring teams. She manages legacy documentation that requires updating to the new branding but has no experience with completing a conversion. Has used FrameMaker before but now has minimal experience with it due to her managerial position	Dave is an expert at service documentation which has a different format than the documentation that customers get. He has had no exposure to the new requirements

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[1] Walter Dick, Lou Carey, and James O. Carey, The Systematic Design of Instruction (Upper Saddle River, New Jersey: Merrill, 2009), 262.

Materials

The instructional materials presented during the one-to-one sessions consisted of:

1. Draft PowerPoint of the training
2. Map of the complete training
3. Getting Started – Checklist

Introduction

Before starting a session I explained to the participant that the object of the session was to get candid feedback on the materials and content presented. I noted all comments relating to the objectives of the instructional materials as well as other comments suggested by the participants.

Procedure

I met with each participant in their work cubicle. Sitting next to them I showed them the map of the course and pointed out that it was only the first of the eight training modules we going to examine in this session. I next showed them a printout of the first module and let them proceed through it. I encouraged them to use the "think aloud" technique to verbalize what they were thinking about when working with the materials.

Results

Table records the comments made by the participants about the instruction. Shaded cells indicate comments that resulted in revisions that were made prior to the Small Group evaluation.

Table 1: One-to-one Evaluation Results

Materials	Mike	Orilee	Dave
Pretest	No pretest is given for these lessons. All participants were required to be familiar with FrameMaker in order to take the training.		
Topic 1 Introduction	Remove "Xerox Internal Use Only" if you are sending this out of Xerox.	No comment	No comment

Materials	Mike	Orilee	Dave
Topic 1 Agenda	Add the total time to the bottom of the agenda. I found myself adding it up to see if it really was an hour!	No comment	No comment
Topic 1 Objectives	No comment	No comment	These objectives don't match the ones you showed me.
Topic 1 Getting Started Checklist (Job Aid)	Add, "You will complete this checklist as you go through this training." Ensure that the links are here to enable this as a job aid as opposed to the slides or else I'd just use the slides as the job aid. Make the Getting Started Checklist a form.	Make the checklist a clickable form to use while onscreen.	Is there any way to make it clearer to find links on the page?
Topic 1 **Objective 1.1.1**: Given the website address, open the Brandcom website	Add a circle around "View the update log" to make the link easier to see. Do I care about changes if I'm starting from zero? If you already have a previous version, check the change log.	No comment	No comment
Topic 1 **Objective 1.1.2**: Locate and download the Brand Identity System from the Brandcom website	No comment	Wow – cool! I didn't know all this stuff was posted!	You have a box, but with my eyes it's hard to see.
Topic 1 **Objective 1.1.3**: Given the website address, go to the DocuShare site and obtain the latest version of the Xerox Global FrameMaker template	Break the paragraphs.	Change "Authoring Services" to Customer Publications. Authoring Services is part of GKLS while Customer Pubs is in Wilsonville. Also, label the covers. If people already have a template, maybe they should check their template and compare versions before downloading. If not the most recent, then download.	Good information on locating the version of the template!

Materials	Mike	Orilee	Dave
Topic 1 **Objective 1.2**: Given the latest Xerox branding policy, identify changes to the policy that might affect your conversion	Seems like a review/highlights of the standard.	No comment	Show the information that you're talking about in the image. This one doesn't really do anything to help someone reading this.
Topic 1 **Objective 1.3.1**: Identify the installed version of FrameMaker	No comment	Circle the version numbers on the illustrations. Maybe add, "You will need to know this later."	Fix objective 3 to match slide 15. Circle the version numbers. Maybe identify the versions of FrameMaker you can use for conversion.
Topic 1 **Objective 1.3.2**: Given the location of the Fonts item in FrameMaker, identify that Xerox Sans font, which is required, is installed. If not installed, install the font.	There is an error if you installed Xerox Sans when it first came out. Do you want to add something about this? *[No since new people will download the correct version of Xerox Sans and existing people will have had the problem fixed.]*	No comment	No comment
Topic 1 **Objective 1.3.3**: Given that FrameMaker is open, validate the installation and version of Paragraph Tools. If not installed, install Paragraph Tools.	Simplify!	This needs fixed. Fix the image as well. It doesn't need to show "About Paragraph Tools."	If Tools isn't available, add to Step 1. (The participant took 10 minutes of the session trying to decide how to rework this objective.)

Materials	Mike	Orilee	Dave
Topic 1 **Objective 1.4:** Given a legacy source file, identify if the file was written using Structured or Unstructured FrameMaker and if it has sidehead icons	Check FrameMaker 7.2 versus 9.0 for the preferences window to see if there are any differences. *[There aren't.]* Adobe recommends staying in Structured for version 9.0. If you are the author and you already know if the source file is Structured, you could skip this step. If you always work in Structured, you will have XTools. If not, you may not have XTools.	Maybe point out that it doesn't matter if the source file is in Structured or Unstructured. People can still convert. Change "Sidehead icons are not **used** in the new Xerox branding" to "Sidehead icons are not **allowed** in the new Xerox branding" In the second paragraph add "typically" to the first sentence [to get "These icons are typically **only** present…] In the second paragraph, second sentence, change, "…you can skip to the next slide." to "you can skip the next slide." XTools may not be installed on all computers that use FrameMaker.	Remove the first sentence. It doesn't help.
Topic 1 Posttest	No posttest was given. It is not required. Instead, review questions were added and the answers supplied.		
	In question 1, change "only font" to "only font family"	No comment	Make the questions more parallel with the objectives.
Comments	Change the title of the slides – it's unclear what it is really about.	Is there audio? Looks pretty good!	Good! It got my creative juices going!

Revisions based on One-one Evaluation

All three participants in the one-to-one evaluation were enthusiastic about the training and offered plenty of valuable comments. Each is an expert at their area and their comments were taken with the intent that they were given – to improve the training, not as criticism. Since the section of training selected was the initial section, none of the participants felt confused as they probably would have been had I picked a section in the middle of the training (no context).

While there were no gaps in the process to set up their computers for the conversion process, there were many comments that added clarity to the training. **Table 1** indicates the changes that were made to the original presentation before being proceeding with the Small Group evaluations.

Small Group Evaluation

2

After changes were made to the training materials (Presentation and Getting Started Checklist), a cover e-mail was created and sent to **12** Xerox employees. Due to schedules (both the employee's work schedules and mine), only **five** employees responded in time to be included in the evaluation results. Although a small group, I felt that their contributions would give me enough information to properly evaluate the existing training and allow me to see if further changes were required before finalizing the training.

Participants

Twelve participants were selected from GKLS NA / GKLS EO (Global Knowledge & Language Services – North America and European Operations). *Of the 12 selected, only four from North America and one from European Operations completed the training and returned questionnaires*. The participants that chose to complete the training ranged in age from 32 to 60. They are all considered FrameMaker experts although one of them has never had to complete a conversion to the new Xerox template before. The other four have completed manual conversions.

Materials

The training was placed on a Xerox server to allow global access for the evaluation. An e-mail was sent instructing the participants on what was expected of them and how to complete and return the questionnaire.

Because the training was designed as self-paced, each participant went to the server to download the training when they were ready which would mirror an actual training scenario. The materials on the server were the PowerPoint training presentation and a 4-page questionnaire.

The questionnaire was based on the ARCS model and was designed to gather information in each of the ARCS areas as well as correlate to the objectives based on a five point scale. The Clarity and Satisfaction questions were attitudinal questions that differed from the Attention, Relevance, and Confidences questions. A copy of the questionnaire is available in the Appendix

Participants worked through the training and completed the questionnaire which was sent back to me. Comments were welcomed on the questionnaire but only two made any type of comment.

Procedures

As stated earlier, an e-mail was sent to all participants with a link to the Xerox server where the training resided. They were instructed to open the PowerPoint presentation and work through the training. Once done, they were instructed to complete and return the questionnaire.

Results

Once the deadline for returning the questionnaires had passed, I compiled the data into a table for Item-by-Objective analysis as well as table to compile the attitudinal data

Questionnaire Results

Item by Objective Analysis

In the tables below, the scale ranged from 1 (Little) to 5 (Very) so I interpreted a 4 or 5 as not requiring modifications to the training, while anything 3 and below required examination and possible change. Shaded cells indicate possible problems with the item.

Note: On the questionnaire, the objectives for 1.1.1, 1.1.2, 1.1.3 were all compressed into a single question and the objective for 1.4 was split into separate questions.

Table 2: Attention / Relevance / Confidence: Item-by-Objective Analysis Table

Objectives	1.1	1.2	1.3			1.4	
Items	1.1	1.2	1.3.1	1.3.2	1.3.3	1.4a	1.4b
A. Attention: To what degree did the following instructional activities *hold your interest or attention*? (1= little 5= very attentive)							
Participant 1	5	5	5	5	3	4	5
Participant 2	5	5	5	5	5	5	5
Participant 3	4	3	3	4	4	3	4
Participant 4	4	4	4	4	4	4	4
Participant 5	3	3	4	4	4	3	4
Average:	**4**	**4**	**4.2**	**4.4**	**4**	**3.8**	**4.4**

Objectives	1.1	1.2	1.3			1.4	
Items	1.1	1.2	1.3.1	1.3.2	1.3.3	1.4a	1.4b
B. Relevance: To what degree do you believe the instructional activity you just finished (Getting Started / Setting up for Conversion) was *relevant* to the conversion process? (1= little 5= very relevant)							
Participant 1	5	5	5	5	3	4	5
Participant 2	5	5	5	5	5	4	4
Participant 3	4	4	3	4	5	3	4
Participant 4	4	4	4	4	4	4	4
Participant 5	5	4	5	4	5	4	5
Average:	**4.6**	**4.4**	**4.4**	**4.4**	**4.4**	**3.8**	**4.4**
C. Confidence: What level of *confidence* do you believe that you have to effectively use these skills to help you with a legacy document conversion? (1= little 5= very confident)							
Participant 1	5	5	5	5	3	4	5
Participant 2	5	5	5	5	5	5	5
Participant 3	4	4	4	4	5	4	4
Participant 4	5	5	5	5	5	5	5
Participant 5	5	5	5	5	5	5	5
Average:	**4.8**	**4.8**	**4.8**	**4.8**	**4.6**	**4.6**	**4.8**

Tables 3 and 4 measure how clear participants thought that pieces of the training materials were and how satisfied they were with parts of the training.

Table 3: Clarity: Analysis Table

Instructional Areas	Training Introduction	Agenda	Objectives for session	Instructions for activities	Getting Started Checklist
D. Clarity: What level of *clarity* do you believe the following instructional materials and activities have? (1= little 5= very clear)					
Participant 1	5	5	5	5	5
Participant 2	5	5	5	5	5
Participant 3	4	4	4	4	4
Participant 4	5	5	5	5	5
Participant 5	5	5	5	5	3
Average	**4.8**	**4.8**	**4.8**	**4.8**	**4.4**

Table 4: Satisfaction: Analysis Table

	The Instruction Presented	Order Tasks Presented	How the Instruction is Presented	Yourself (relative to new skills learned)
Participant 1	5	5	5	5
Participant 2	5	5	5	5
Participant 3	4	4	5	4
Participant 4	5	5	5	5
Participant 5	5	5	5	5
Average	**4.8**	**4.8**	**4.8**	**4.8**

Comments

Only 3 of the participants included comments. Their comments are as follows:

Objectives
Were clear, concise, and comprehensive

Agenda
Was outlined with the right amount of specifics while not being too wordy

Presentation
1. Was very interesting, understandable, and provided the necessary information required for performing the task
2. Use of color, particularly with color coordinating arrows with boxes could be a problem for color blind participants. Maybe use color AND formatting.
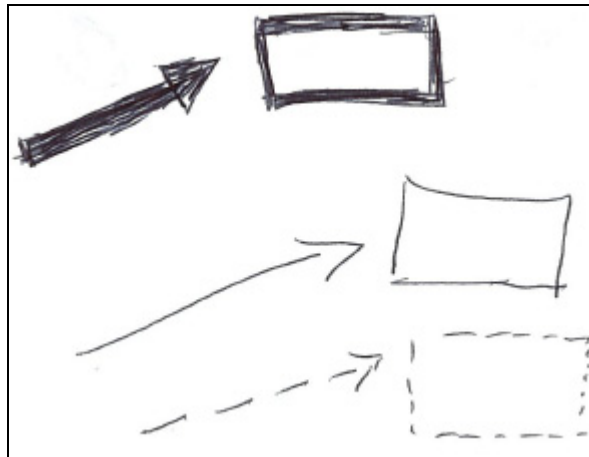
Note: If you don not have XTools installed, you can remove each sidehead icon manually or contact GKLS/System Support (C. VanCassele) to have XTools installed.

Other
1. Once I had a link that worked, all was much better!
2. Good job!

Revision Plan

The data from the small group evaluation was analyzed to identify any areas of the materials that require revision before producing the final training. I found that, probably due to the number of revisions from the one-to-one evaluation, far more problems would have been by the small group evaluation – the desired effect.

The area with the lowest scores for the small group evaluation was the **Attention** section where participants found the material at a mid-level of 3. Because they had to visit two different websites, they got distracted by other information on the websites they had not seen before.

Participants found the training, on the whole, relevant and displayed a high level of confidence in being able to use the training. Participants were, satisfied with the training and thought that it was clear. Participants managed to catch a couple of errors in the PowerPoint that the one-to-one sessions missed.

Table 5: Instructional Revision Analysis Form

Instructional Strategy Source	Problem	Proposed Change in Instruction	Evidence and Source
Motivational, introductory material	Attention and Relevance in 1.2 (Examine branding policy updates) and 1.4a (Checking to see if legacy documentation is in Structured format).	Examining for policy updates and checking to see if a document is currently in Structured format are time consuming in the training and so, this might be a reason for the low attention and relevance scores. I *would recommend revisiting these sections of the training and inserting reasons why these steps are important (boring as they may be!). If a policy changes and someone submits a document using an old template that uses incorrect policies results in delays in being able to release a document.*	Attention and Relevance sections of questionnaire.
Information Presentation	No problems	None	n/a
Learner Participation	No problems	None	n/a

Instructional Strategy Source	Problem	Proposed Change in Instruction	Evidence and Source
Questionnaire	No participants stated any problems with the questionnaire but I had problems with it as the person collecting data.	Tie the questions closer to the objectives. They are all present, but some are combined in a question. The net result would be a longer questionnaire but would yield better data.	Questionnaire
Other	There were two typographical errors to correct. One was an incorrect web link to the Paragraph Tools website and the other was a simple typo ("don" instead of "do")		Comments from the participants. Interestingly, none of the one-to-one session people caught the non-working web link or the extra word in the text.

Appendix

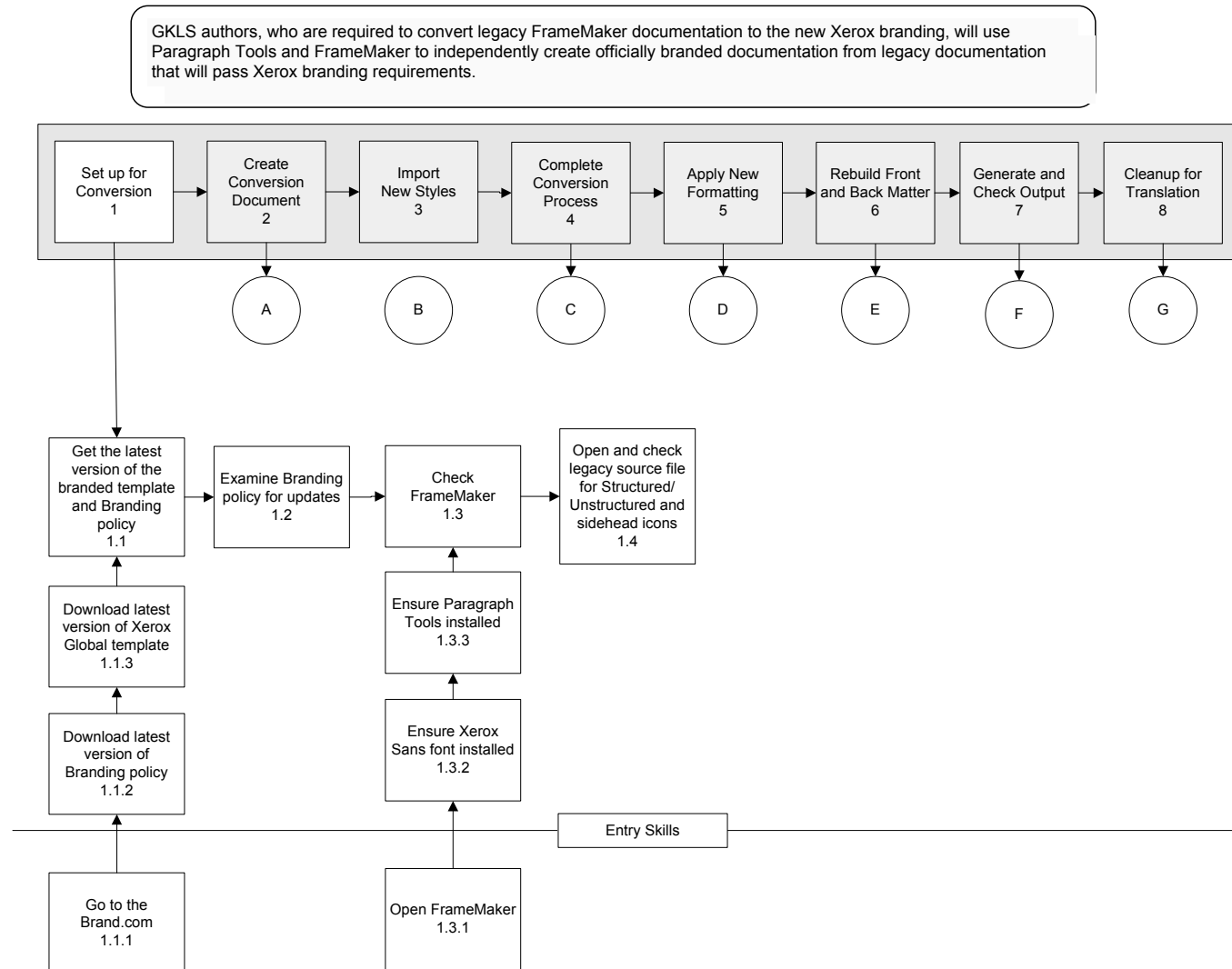## Instructional Materials Drafts

The materials presented here are what were shown to the participants:

1. **Appendix A**: Step 1 (Excerpt from the Instructional Analysis)
2. **Appendix B:** Slides from the training presentation
3. **Appendix C:** Questionnaire

Appendix

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Appendix A: Step 1 (Excerpt from the Instructional Analysis)

GKLS authors, who are required to convert legacy FrameMaker documentation to the new Xerox branding, will use Paragraph Tools and FrameMaker to independently create officially branded documentation from legacy documentation that will pass Xerox branding requirements.

Set up for Conversion 1	Create Conversion Document 2	Import New Styles 3	Complete Conversion Process 4	Apply New Formatting 5	Rebuild Front and Back Matter 6	Generate and Check Output 7	Cleanup for Translation 8

A   B   C   D   E   F   G

Get the latest version of the branded template and Branding policy
1.1

Examine Branding policy for updates
1.2

Check FrameMaker
1.3

Open and check legacy source file for Structured/ Unstructured and sidehead icons
1.4

Download latest version of Xerox Global template
1.1.3

Ensure Paragraph Tools installed
1.3.3

Download latest version of Branding policy
1.1.2

Ensure Xerox Sans font installed
1.3.2

Entry Skills

Go to the Brand.com
1.1.1

Open FrameMaker
1.3.1

Appendix

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Assignment 4: Instructional Design for Conversion of Legacy FrameMaker Documentation

Appendix B: Slides from the training presentation

See the PDF of the PowerPoint presentation included as an attachment for this assignment.

Slide 1

Appendix C: Questionnaire

Questionnaire for

Converting Legacy FrameMaker Documentation to the new Xerox Branding (Part 1)

Instructions
Use the following questionnaire to judge the effectiveness of the training session you just completed on setting up your computer to prepare for a legacy document conversion.

Please rate the quality of the instruction in each of the categories listed below. For each of the areas listed on the left, circle the response on the right that best reflects your perception of the quality level. At the bottom of this form, please comment on aspects of this training that you consider to be particular strengths *or* problems.

Remember, there are no right or wrong answers. This information will be used to improve the final training materials. You are commenting on the training, not the person who wrote the training.

Thank you!

A. Attention
To what degree did the following instructional activities *hold your interest or attention*?

Instructional Areas	Attention Level (Circle one number level for each area)						
A. Viewing the Brandcom website to get documents and templates	Little	1	2	3	4	5	Very attentive
B. Examining branding policy to check for changes to colors and typography	Little	1	2	3	4	5	Very attentive
C. Checking FrameMaker version	Little	1	2	3	4	5	Very attentive
D. Checking if Xerox Sans installed	Little	1	2	3	4	5	Very attentive
E. Checking if Paragraph Tools installed	Little	1	2	3	4	5	Very attentive

F. Checking legacy document to see if it was written in Structured Framemaker	Little	1	2	3	4	5	Very attentive
G. Removing sidehead icons	Little	1	2	3	4	5	Very attentive

B. Relevance:

To what degree do you believe the instructional activity you just finished (Getting Started / Setting up for Conversion) was *relevant* to the conversion process?

	Relevance Level (Circle one number level for each area)						
1. Viewing the Brandcom website to get documents and templates	Little	1	2	3	4	5	Very relevant
2. Examining branding policy to check for changes to colors and typography	Little	1	2	3	4	5	Very relevant
3. Checking FrameMaker version	Little	1	2	3	4	5	Very relevant
4. Checking if Xerox Sans installed	Little	1	2	3	4	5	Very relevant
5. Checking if Paragraph Tools installed	Little	1	2	3	4	5	Very relevant
6. Checking legacy document to see if it was written in Structured Framemaker	Little	1	2	3	4	5	Very relevant
7. Removing sidehead icons	Little	1	2	3	4	5	Very relevant

C. Confidence:

What level of *confidence* do you believe that you have to effectively use these skills to help you with a legacy document conversion?

	Confidence Level (Circle one number level for each area)						
8. Viewing the Brandcom website to get documents and templates	Little	1	2	3	4	5	Very confident
9. Examining branding policy to check for changes to colors and typography	Little	1	2	3	4	5	Very confident
10. Checking FrameMaker version	Little	1	2	3	4	5	Very confident
11. Checking if Xerox Sans installed	Little	1	2	3	4	5	Very confident
12. Checking if Paragraph Tools installed	Little	1	2	3	4	5	Very confident
13. Checking legacy document to see if it was written in Structured Framemaker	Little	1	2	3	4	5	Very confident
14. Removing sidehead icons	Little	1	2	3	4	5	Very confident

D. Clarity:

What level of **clarity** do you believe the following instructional materials and activities have?

Instructional Areas	Clarity Level (Circle one number level for each area)						
15. Training introduction	Little	1	2	3	4	5	Very clear
16. Agenda	Little	1	2	3	4	5	Very clear
17. Objectives for session	Little	1	2	3	4	5	Very clear
18. Instructions for activities	Little	1	2	3	4	5	Very clear
19. Getting Started Checklist	Little	1	2	3	4	5	Very clear

E. Satisfaction:
Overall, how satisfied were you with:

	Satisfaction Level (Circle one number level for each area)						
20. The instruction presented	Little	1	2	3	4	5	Very satisfied
21. The order that the tasks were presented	Little	1	2	3	4	5	Very satisfied
22. How the instruction is presented (self-paced as opposed to instructor-led)	Little	1	2	3	4	5	Very satisfied
23. Yourself, relative to the new skills you have developed/refined	Little	1	2	3	4	5	Very satisfied

F. Comments:
Please comment on aspects of this training that were strengths or problems for you personally.

Strengths   **Problems**

Introduction:

Objectives:

Agenda:

Presentation:

Other:

Other:

Appendix

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