Assignment 4: Formative Evaluations and Plan for Revising Instructional Materials

This report documents formative evaluations of draft instructional materials. The instruction was designed for Symantec's NetBackup Information Development team so that they can successfully resolve writing style issues using the tools and reference materials suggested by Symantec's corporate information development group. The draft materials were created for *Objective 3: Address sentence-level style issues*. Prerequisite objectives are *Objective 1. Analyze topic content with acrolinx IQ* and *Objective 2. Address word-level (spelling, terminology, and grammar) errors*.

This report consists of three parts:

- 4.1 One-to-One Formative Evaluations
- 4.2 Small Group Formative Evaluation
- 4.3 Plan for Revising Instructional Materials

4.1 One-to-One Formative Evaluations

Participants

I selected three participants from among the 13-member NetBackup Information Development team for the one-to-one formative evaluation of the instructional materials for *Objective 3: Address sentence-level style issues.* Table 1 provides descriptions of the selected participants.

Table 1. Participants in one-to-one formative evaluations

	Emily	Diane	Eric
Learner Type and Selection Rationale	 Above average. Emily is a team project leader as well as a writer. She has expressed enthusiasm for the subject matter but confesses that she often ignores style issues in her acrolinx IQ analysis reports. 	 Average. Diane participated in training about the content management system four years ago, and "vaguely remembers" what it covered about acrolinx IQ. 	 Below average. Eric started his career as a support technician and moved into information development two years ago. He is often vocal about his frustrations with acrolinx IQ.
Title	Principal Information Developer	Senior Information Developer	Senior Information Developer

	Emily	Diane	Eric
Experience	 5+ years with Symantec, all with this team. 27 years in technical communication. 	 11 years with Symantec, all with this team. 21 years in technical communication. 	 10 years with Symantec, the last two years with this team. 5+ years in technical communication.
Education	MA in technical communication.	BA in English.	BA in Political Science.

Location, Materials, and Equipment

Each one-to-one evaluation took place in the participant's office. All information developers on this team have small, private offices that provided a quiet environment for the evaluation sessions.

The following materials and equipment were used during the one-to-one formative evaluations:

- Instructional narrative (printed)
- PowerPoint slides (printed and accessed online)
- Topic with sample sentences (accessed through the Vasont CMS interface)
- acrolinx IQ content analysis report (printed and accessed online)
- acrolinx IQ content online help example (printed and accessed online)
- A copy of John Kohl's *The Global English Style Guide*
- Symantec's style guide (accessed through Help on the Vasont interface)
- Participant's laptop PC
- Vasont content management system
- XMetal XML editor
- Acrolinx IQ content analysis software (accessed through a menu selection in XMetal)

Procedures

Before our meetings, I sent an email message to each participant. In the message, I explained that that I wanted their comments and opinions about the proposed instruction and requested a one-to-one meeting in their offices. Each participant accepted the invitation.

After initial greetings, I explained the procedure that we would follow for this meeting. Then I asked the participants to log in to their account in the content management system, Vasont. I also asked the participants to access the PowerPoint presentation on a shared drive. At this point, I started the activity as directed in the instructional narrative. (See Appendix A – Instructional Narrative.)

I sat next to the participants during the meetings and made notes of her or his actions and reactions to the instruction. I encouraged the participants to think aloud throughout the meeting.

Note: I had initially scheduled 60 minutes for the evaluations. After the first meeting with Emily lasted 90 minutes, I altered the time accordingly after getting Diane's and Eric's approvals.

Results

Table 2 contains the comments, concerns, and suggestions that I noted during the one-to-one formative evaluations.

Table 2. Comments noted during one-to-one formative evaluations

	Emily	Diane	Eric
Overall objective	• Felt that training about dealing consistently with style issues is needed. This objective is a "start."	• Liked that the training gives the writers a "high-level" process for solving style problems. "Well-thought out."	 The objective is "probably fine," but thinks that style issues should be up to the writer. He often skips addressing style errors in his content. Thought the "importance of addressing style issues" was "interesting." Does not care about saving translation costs, but sees why consistency is necessary for "baseline" (source) English- language content.
Instructional narrative	 Thought the basic flow was good. Liked the method of prioritizing the issues. Suggested mentioning how the list of ten most frequently violated style 	 Suggested that an instructor start the session by giving out a gift – the Kohl book – to grab learners' attention. Some of the beginning was slow and not new 	Wondered if narrative should be available for learners who might miss the training. Felt training could be self-instruction if the narratives was available.

	Emily	Diane	Eric
	rules was compiled.	to most writers. Suggested diving in with the exercise with less introduction. Suggested less explanation about the style guide because the guide does not deal much with style rules. Thought the differences and similarities between the training environment and the office was not necessary because they are obvious.	
PowerPoint slides	Corrected a couple of typographical errors.	"Every meeting has to have PowerPoint, I guess!"	 Not sure if slides are needed for instructor-led training. "They seem to state the obvious." Most helpful slide: ten most frequently violated style rules.
Topic with sample sentences	Thought 50 sample sentences were too many to finish in 20 minutes.	 Thought there were too many sample sentences to correct in one session. (After reducing the number of sample sentences from five to three for each style rule error.) Liked working on a sample sentence as a group. Suggested that the group work together on one sentence for each of the ten most violated style rules, then complete the rest at their desks before the next team meeting. 	 Would have liked working on a "live" topic but understood that the sample sentences covered more of the errors that could be generated than a "live" topic would. Thought two sample sentences per style error was a good number if practice items for a 30-minute activity. (After reducing the number of sample sentences from three to two for each style rule error and lengthening the duration to 30 minutes.)

	Emily	Diane	Eric
acrolinx IQ content analysis report	• [Did not comment.]	Did not realize that the acrolinx IQ were color- coded.	Usually looks only at the overall score. "Good to know that the report can be handy."
acrolinx IQ online help	Thought that some of the help is too vague to actually help solve a problem.	Had forgotten that there was any online help for style errors. "Good that the training pointed out that help exists, even to us veterans."	Didn't know that the help existed. Will use it in the future.
Global English Style Guide	• Didn't have much time to check it out during the evaluation. Thought it will be helpful in the future, but it is a lot of information to take in and apply. "The online help is like tapping [the problem] with your hand. This book is like hitting it with a hammer."	Wanted more time to explore the book. Suggested that learners receive the book a week before the training to peruse the material.	Not sure if he would use this book unless it's available online.
Style Guide	Agreed that the guide didn't really offer guidance with style issues.	Did not use it during the evaluation. Rarely uses it in the work day.	"Worthless." Has found the information in this guide unreliable even for basic procedures.
Feedback / self-checking	Having the learner check the rewrites on the fly works well.	Liked the idea of sending the final acrolinx IQ analysis report to the instructor. "It's like handing in the final exam to the teacher, only with electronics!"	Had forgotten about the immediate feedback of checking corrected sentences. Liked this feature.

Revisions Based on One-to-One Evaluations

I made the following changes to the draft materials based on the one-to-one evaluations:

- After meeting with Emily:
 - o Added a couple of sentences to the instructional narrative about how the list of ten most frequently violated style rules was compiled

- Corrected typographical errors in the PowerPoint slides
- o Reduced the number of sample sentences from five to three for each style rule error.

• After meeting with Diane:

- O Used the distribution of the Global English Style Guides as a way to gain the learner's attention at the start of instruction, and also get that task out of the way early.
- o Removed some content about the Symantec style guide.
- o Reduced the number of sample sentences from three to two for each style rule error and lengthening the duration of the activity to 30 minutes.

• After meeting with Eric:

o Removed all examples of content from the Symantec style guide.

4.2 Small Group Formative Evaluation

Participants

I selected four participants from among the 13-member NetBackup Information Development team for the small group formative evaluation of the instructional materials for *Objective 3: Address sentence-level style issues*. Table 3 provides descriptions of the selected participants.

Table 3. Participants in the small group formative evaluation

	Gary	Jim	Gretchen	Dennis
Title	Principal Information Developer	Senior Information Developer	Senior Information Developer	Senior Information Developer
Experience	 9 years with Symantec, all with this team. 27 years in technical communication. 	 11 years with Symantec, all with this team. 30 years in technical communication. 	 10 years with Symantec, all with this team. 12 years in technical communication. 	 11 years with Symantec, all with this team. 21 years in technical communication.
Education	BA in English	BA in English.	BA in Business Administration.	BA in History.

Location, Materials and Equipment

The small group evaluation took place in a large conference that accommodates 20 people. It is the same conference room that the participants use regularly for their team meetings. The room contains projection equipment and 20 network ports.

The following materials and equipment were used during the small group formative evaluations:

- Instructional narrative (instructor only)
- PowerPoint slides
- Topic with sample sentences (accessed through the Vasont CMS interface)
- acrolinx IQ content analysis report (accessed online)
- acrolinx IQ content online help (accessed online)
- A copy of John Kohl's *The Global English Style Guide*
- Symantee's style guide (accessed through Help on the Vasont interface)
- Instructor's laptop PC attached to an projector
- Participant's laptop PCs connected to the corporate network
- Vasont content management system
- XMetal XML editor
- acrolinx IQ content analysis software (accessed through a menu selection in XMetal)

Procedures

Five days before our small group evaluation meeting, I sent an email message to each participant. In the message, I explained that I wanted them to participate in a meeting to evaluate an instructional activity designed to improve their ability to address sentence-level style issues identified by acrolinx IQ. I mentioned that cookies and coffee would be available and that each participant would receive a "gift." Each participant accepted the invitation promptly. I also asked a co-worker (Emily, who participated in the one-to-one evaluations) to attend and mark the actual time for each element listed in the instructional narrative. (See Appendix A – Instructional Narrative.)

The day of the small group session, I arrived early to the conference room to ensure that equipment was functioning properly and that the coffee and cookies had been delivered. All participants arrived on time with their laptop computers. After initial greetings, I asked the participants to connect their laptops to the network and then log in to their account in the content management system, Vasont. Then, I started the activity as directed in the instructional narrative.

Results

Note: I underestimated the amount of time needed for this exercise. I had allowed about 20 minutes of instruction and 30 minutes of practice. In the actual session, instruction time was about 60 minutes and the total time was over 100 minutes.

Table 4 contains each participant's results based on the final content analysis that they generated at the end of the activity. The sentence labels (1a, 1b, and so on) correspond to the sentences that are listed in Appendix C – Sample Sentences. A \checkmark indicates that the participant's correction to the problem sentence passed the acrolinx IQ analysis. The overall score refers to a rating that acrolinx IQ calculates. A score of 0 indicates no errors. Symantec standards call for a score of under 100 before the content is ready for publication and translation. All participants in the small group evaluation scored under 100 and therefore passed Symantec's criterion.

Table 4. Results of the final content analysis reports of participants in the small group formative evaluation

Sentence	Gary	Jim	Gretchen	Dennis
(Overall Score)	0	54	81	0
1a	✓	✓	✓	✓
1b	✓	✓	✓	✓
2a	✓	✓	✓	✓
2b	✓	✓	✓	✓
3a	✓	✓	✓	✓
3b	✓	✓	✓	✓
4a	✓	✓	✓	✓
4b	✓	✓	✓	✓
5a	✓	✓	✓	✓
5b	✓	✓	✓	✓
6a	✓	✓	✓	✓
6b	✓	✓	✓	✓
7a	✓	✓		✓
7b	✓	✓		✓
8a	✓	✓	✓	✓
8b	✓	✓	✓	✓
9a	✓	✓	✓	✓
9b	✓	✓		✓
10a	✓		✓	✓
10b	✓		✓	✓

Table 5 contains the responses to the survey that participants completed after the small group evaluation.

Table 5. Survey responses from participants in the small group formative evaluation

Question	Gary	Jim	Gretchen	Dennis
Is this subject	Yes	Yes	Yes	Yes
(addressing style				
issues) relevant to				
the work you do?				
Do you think you	Yes	Yes	Yes	No
will improve your				
ability to resolve				
style issues after				
taking this				
instruction?				
Did you use the	Yes	Yes, but it wasn't	Yes, but I usually	Yes
acrolinx IQ online		much help.	didn't need it.	
help to address style		1		
issues?				
Did you use the	Yes.	Yes. (see comment	Yes, but again I	Yes
Global English Style		below)	didn't necessarily	
Guide to address		,	need it.	
style issues?				
Did you have	Yes	No	Yes, but I screwed	Yes
enough time to			up on a few	
complete the			solutions. (Got a	
exercise?			score under 100,	
			though!)	
Did you think that	Yes, very!	Yes, more than our	Yes	Yes
the presentation was		boring old writing!		
enjoyable?				
Other comments?	The Global English	The book has a lot of	This was fun with	If Symantec wants to
	book is a nice	information! I wish	such a small group,	change the way we
	reference. Has	we had had more	but I wonder if it	write (or enforce
	anyone thought of	time to look at it.	wouldn't be too long	their unwritten
	having a series of		or lecture-like	standards), they
	brown bag lunches		(boring) if there	should provide more
	as a follow up to this		were more people in	training than a one-
	training? This book		a session.	hour training
	has a lot of topics we			session. This was
	could benefit from.			good for pointing
	This training sort of			out some tell-tale
	skims the surface on			issues to look for
	writing style.			and it was a quick
				review of some
				reference material,
				but they should
				provide more in-
				depth training if they
				want big results.

4.3 Plan for Revising Instructional Materials

In general, the draft instructional materials as well as the intent of the objective were well-received by the participants in the one-to-one and the small group formative evaluations. Revisions to the instructional materials based on the evaluations should be not be extensive. (See Table 6 for details about proposed changes to the materials.)

The major problem that the small group evaluation highlighted is the amount of time it took to present the information. As noted earlier, the learning experience for Objective 3 was designed to take 60 minutes, but actually took about 100 minutes.

To fix this problem, I suggest the following measures:

- Review the performance objectives and the learning strategies. Specifically, reassign some of the information presented about using acrolinx IQ, its reports, and online help to Objective 1 (Analyze topic content with a controlled authoring tool (acrolinx IQ).) Discussing all relevant information about the tool earlier will reduce the amount of time covering these details in subsequent objectives, such as Objective 3, and make Objective 1's presentation about acrolinx IQ more comprehensive.
- Present the ten most frequently violated style rules with Objective 1. Many of the questions from the small group evaluation participants were about how the list was generated from acrolinx IQ. Again, answering these questions earlier with Objective 1 will reduce the amount of time needed for Objective 3 information.
- Keep non-essential discussion to a minimum during the instructional presentation. Conversation can easily and often wander off the topic, especially when participants and the instructor are familiar with each other. While the instructor should keep the presentation lively and pleasant, off-topic chitchat and lengthy anecdotal answers should not become excessive. Some specific answers for individual participants can be addressed outside of the session if necessary. With more experience, the instructor (that is, I) should develop a better feel for the pace of the instruction and be able to adjust the time spent in presenting this material.

Table 6 summarizes problems noted during the evaluations and provides proposed changes.

Table 6. Instructional revision analysis – problems and proposed changes

	• -		_
Instructional Strategy	Problems	Proposed Change in	Evidence and Source
Source		Instruction	
Motivational, introductory	No major problems with	Add a note to the	Actual time as
material	motivation or introductory	instructional narrative that	documented during the
	materials other than the	reminds the instructor to	session versus estimated
	overall pace of the	keep discussion focused	time for presentation and
	learning experience	and to be aware that the	activities.
	contributed to the length of	entire session should last	

Instructional Strategy Source	Problems	Proposed Change in Instruction	Evidence and Source
	the session.	only 60 minutes.	
Pretest	None.	None.	The formative evaluations did not indicate that a pretest for this objective is necessary for this audience.
Information presentation	The presentation was too long. See specific problem descriptions in the table	Present some of the information earlier in Objective 1. See specific	Actual time as documented during the session versus estimated
	cells below.	suggestions in the table cells below.	time for presentation and activities.
	Recall Relevant Prior Knowledge: Ask learners to retrieve (extract) the sample topic from the CMS and analyze its content with acrolinx IQ. Scheduled: 1 min. Actual: 3 min. Learners started reading the sentences and the analysis report before indicating that they were ready to proceed (raising their hands, as instructed). Instructor did not know	Add note to instructor in the instructional narrative to check that participants have displayed the report on their monitors as directed. Instructor should not rely on a show of hands.	
	they were ready. Focus Attention: Explain the importance of addressing style issues Scheduled: 5 min. Actual: 10 min. Learners asked many questions about how	Introduce the list of style rule violations in Objective 1 and explain how the list was obtained from the CMS. During the Objective 3 instructional	
	the ten most frequently violated style rules were identified. Present Information and Examples: Review the Style section of the analysis report. Scheduled: 2 min. Actual: 5 min. One learner asked many (good) questions about the entire analysis report.	session, briefly review the frequently violated rules. Discuss the entire analysis report in detail in Objective 1 including the style section. For Objective 3, use the report as a tool, but do not review the report in detail.	

Instructional Strategy Source	Problems	Proposed Change in Instruction	Evidence and Source
Source	Present Information and	Discuss the online help in	
	Examples: Discuss the	detail in Objective 1. For	
	available online help.	Objective 3, use the online	
	Scheduled: 2 min. Actual:	help as a tool, but do not	
	5 min. Learners spent a	discuss the help in detail.	
	great deal of time	discuss the help in detail.	
	commenting on the		
	obviously inferior online		
	help.		
Learner Participation	No major problems. Most	Again, add a note to the	Actual time as
Learner 1 articipation	of the small group	instructional narrative that	documented during the
	participants are talkative	reminds the instructor to	session versus estimated
	and enthusiastic by nature.	keep discussion focused.	time for presentation and
	This, however, resulted in	Instructors need to be	activities.
	lengthening the learning	aware of the elapsed time	detivities.
	session.	and encourage only	
	Session.	relevant comments.	
Posttest	No posttest was given.	In reviewing final analysis	Survey comment from
Tostest	However, one participant	reports and survey	participant "Gary."
	suggested that some	responses, the instructor	purticipunt Gury.
	follow-up discussion, such	can try to identify specific	
	as "brown bag lunches,"	style issues and present	
	would be appreciated.	that information in brown	
	The second secon	bag lunches. Also, in the	
		Conclusion of the	
		instructional narrative, the	
		instructor can ask the	
		participants what subjects	
		they would like addressed	
		in future presentations.	
Attitude questionnaire	None noted.	No proposed changes at	Survey responses seemed
-		this time. Specific	to capture the general
		questions may be changed	attitudes of the small
		or added in future surveys	group evaluators.
		to reflect any changes to	
		the team, tools,	
		instructional content, or	
		strategic direction of	
		company or team.	

Appendix A – Instructional Narrative

The following instructional narrative pertains to *Objective 3: Address sentence-level style issues*. This is the narrative that was used in the one-to-one and small group formative evaluations.

Instructional Narrative

Preparation activities

- Purchase copies of *The Global English Style Guide* (one for each learner) at least two weeks before instructional session.
- Schedule conference room one week before instructional session.
- Send invitations to learners one week before the instructional session. Tell participants to bring their laptop computers to the session.
- Arrange any beverages or food items at least a day before the instructional session. Schedule delivery for 10 minutes before the instructional session begins.
- Arrive 30 minutes before participants to set up room.
- Connect instructor's laptop computer to network and to projection unit.
- Test projection unit.
- Test connections to content management system, sample content, PowerPoint slides, email.
- Bring a printed copy of the Instructional Narrative.
- Bring one copy of *The Global English Style Guide* for each learner in the session.

Introduction

Gaining learner's attention			
Do/Resources/Time	Say		
Do: Walk around the room to each learner and hand them their copy of the Kohl book.	Here's a free gift from Symantec! It's John Kohl's <i>The Global English Style Guide</i> . The style rules that are coded into our acrolinx IQ content analysis tool are based on many of the same guidelines that Mr. Kohl explains in this book. This book serves as a supplement to your own knowledge about writing for a global market and to the brief		
Resources:	online help that the software provides for each error.		
■ John Kohl's <i>The Global English Style Guide</i> (one for each learner)	But we'll take a brief look at the book in a few minutes. For now, set the book aside while I go over what's in store with the next activity.		
Time:			

Scheduled: 1 min.Actual: 2 min.	
In	forming Learner of Instructional Purpose
Do/Resources/Time	Say
Do: Explain the objective of the activity.	Your objective in the next activity is to successfully resolve the style issues in sample sentences using suggested reference materials, if needed.
Resources:	
 PowerPoint slide that lists the objective 	
Time:	
Scheduled: 1 min.Actual: 1 min.	
S	timulate Learner's Attention/Motivation
Do/Resources/Time	Say
Do: Ask about acrolinx IQ style rules.	Let's see a show of hands. How many of you have looked at the style errors generated by acrolinx IQ and wondered what they meant?
Resources:	And how many of you ignore the style issues, especially if your acrolinx IQ score is already under 100?
■ None	The style rules in acrolinx IQ are meant to enforce the corporate writing style. In many organization, writers have a style guide that explains writing rules and guidelines.
Time:	
Scheduled: 1 min.Actual: 2 min.	Unfortunately, our style guide is really more of a user guide for operating Vasont, our content management system, and for structuring content according to topic-based writing models. The style guide lacks any reference material about the specific rules and

	guidelines that we should follow when authoring content.
	Instead, we are asked to analyze our content with acrolinx IQ and rework our material until our analysis score is under 100. And as you know, until now, we have received no instruction and little reference materials for writing. Hopefully, this activity will improve your ability to fix style errors by pointing out the most common errors and providing some references to use when resolving the errors. Are there any questions before I describe the next activity?
	Preview Learning Activity
Do/Resources/Time	Say
Do: Summarize the activity.	Today you will practice writing in the Symantec style by fixing style problems in some sample sentences selected from our team's content. Each sample sentence contains one style issue.
Resources: • PowerPoint slide that lists activity steps.	We'll extract the topic that contains these samples, run an acrolinx IQ content analysis, review the help and references available for fixing style issues, and then fix the first sample sentence together. After that, you will have 20 minutes to fix as many of the remaining sentences as you can. You may ask me or anyone else in
Time: Scheduled: 2 min. Actual: 5 min.	the room questions, but use the references first. You can recheck your fixes at any time by running an analysis on a corrected sentence, section, or the entire topic.
	At the end of the 20 minutes, I will ask you to run a final analysis on your corrections, copy the analysis report and paste it in an email message, and send that message to me.
	You're not being graded or evaluated based on this report. Instead, I want to use the reports as one measure to see if the exercise and the references were effective.
	I'll also ask you to complete a brief survey to get your opinions about this activity.
	Are there any questions about what we are about to do or anything that we've already completed?

Body

Recall Relevant Prior Knowledge	
Do/Resources/Time	Say
Do: Ask learners to retrieve (extract) the sample topic from the CMS and analyze its content with acrolinx IQ.	[Instructor performs the same actions asked of the learner. The actions will be projected on the screen at the front of the room.] As you did in the previous exercise (correcting spelling, grammar, and terminology issues), extract a sample topic from Vasont (the CMS). The topic I want you to extract for this activity has Client Key vNNNNN.
Resources: Sample topic in the CMS Analysis report for the sample topic Time: Scheduled: 1 min. Actual: 3 min.	Next, analyze the content of the topic with acrolinx IQ and display the analysis report on your monitor. Raise your hand when you have successfully displayed the report. [On everyone's monitors, the topic will be displayed in the window that is running the XML editor XMetal. The analysis report will be displayed in a separate browser window.]
	Focus Attention
Do/Resources/Time	Say
Do: Explain the importance of addressing style issues	The topic that we all extracted contains sample sentences that have only style issues. Also, every sentence in the topic has a style issue. In your own topics, you will see a mix of style, spelling, grammar, and terminology errors after analyzing the content. How do you know which errors to address? Which are the most important?
Resources: PowerPoint slide that lists the top ten style rule violations	In a perfect world, you would correct all of the errors. But as you already know, you may not have time or you may have had a reason for wording the sentence as you did, even though it triggers a style rule error. Symantec's InfoDev team understands that you as a writer should have some flexibility in resolving style issues,

Time: and that is why your goal with acrolinx IQ content analysis is to get a score of under 100 rather than a score of 0. Scheduled: 5 min. Actual: 10 min. The following rules are our team's top ten most frequently violated style rules: 1. Sentence too long 2. Use relative pronoun 3. Avoid future tense 4. Disambiguate -ing words 5. Use articles 6. Use this and that with a noun 7. Avoid progressive tense 8. Avoid passive 9. Avoid parenthetical expressions 10. Repeat head noun This list is based on research conducted on our team's content. It is not a general list of rules that are frequently violated by writers everywhere. If you fix these errors first, you will probably fix enough errors to bring the acrolinx score under 100. But more importantly, your content will be more consistent in adhering to our style rules, for example, it will contain no sentences that are too long if you fix all of the #1 "sentence too long" errors. If the content is consistent, English-language readers are more likely to understand it easily. Consistency also results in lower translation costs because human translators can translate content easily and quickly, and machine translation tools can translate text with greater accuracy. Are there any questions before we look at the analysis report and the analyzed topic? **Present Information and Examples** Do/Resources/Time Say [Instructor performs the same actions asked of the learner. The Do: actions will be projected on the screen at the front of the room.] Review the Style section of the analysis Let's look at the analysis report for the sample topic. report.

• Locate the style issues in the content.

Notice where the acrolinx IQ score is shown. It's pretty high for this topic -534.

Resources:

- Sample topic in the CMS
- Analysis report for the sample topic

Time:

- Scheduled: 2 min.
- Actual: 5 min.

Scroll to the Style section of the report. Notice that the report provides a Summary section that includes the number of violations for each style issue found in the topic.

Following the Summary section, the report provides a Details section that lists each sentence that contains an error, grouped by the type of error. In this section, words or phrases that triggered the rule violation are highlighted in read. For instance, in many of the sentence grouped under the "avoid future tense" rule, the words "will be" are in red to indicate that they triggered the violation. If you rewrite the sentence without the "will be," then you correct this error – and hopefully do not introduce a different style error!

Now display the topic. Notice that acrolinx IQ highlights the errors in each sentence with a color. This sample topic contains only style errors, of course.

Let's take a quick look at how errors show up in a "live" topic.

Practice

Do/Resources/Time	Say
Do: Locate style issues in a "live" topic. Prioritize style issues by the number of occurrences of each issue.	[Instructor performs the same actions asked of the learner. The actions will be projected on the screen at the front of the room.] Extract one of your own topics from Vasont, then run an analysis for the content. Display the topic window on your monitor. Can anyone locate a style issue? How can you tell the difference between a style issue and, for instance, a spelling error?
Resources: "Live" topic in the CMS Analysis report for the "live" topic Time:	Notice that the style issues are highlighted in the topic with green and interspersed with the other color-coded issues for spelling (red), grammar (blue), and terminology (pink). Also notice that your content may have some different style issues than the ones listed as top ten issues. You can use the same references to help you understand and resolve top ten style issues and less frequent style issues. Now display the analysis report on your monitor.

Scheduled: 5 min.Actual: 7 min.	Scroll to the Style section of the report. Look at the Summary section and notice the number of violations for each style issue found in the topic.
	It's a good idea to prioritize the style rule violations by the number of occurrences and tackle sentences with the most frequently violated rules first. That way you can address those problems consistently, applying the same or similar corrections to the largest number of problems, and resolving these issues quickly.
	Let's go around the room and have each of you tell us just the top three rules that had the most violations in your topic. These issues are the ones you should address first.
	[It is possible that some learners will select topics that do not have even three style rules violated, though this seems unlikely from statistical reports generated from the CMS. If a learner reports fewer than three violations, praise them, point out that this is rare, and move on to the next learner.]
	You can close the windows with your topic and your topic's analysis report now.
	Are there any questions before we move on?
	Present Information and Examples
Do/Resources/Time	Say
Do: Discuss the available	Before you address style issues in the sample sentence, let's discuss the reference materials you have available to you.
online help.	Some of the style rules probably seem clear: "sentence too long," "avoid passive," and so on. Others may seem vague or completely
Resources:	unclear: "disambiguate –ing words" or "use this and that with a noun." (What is "this and that"?)
Sample topic in the CMS	acrolinx IQ provides brief online help for each error, but it's not obvious to everyone how to access it
Time: Scheduled: 2 min.	[Instructor performs the same actions asked of the learner. The actions will be projected on the screen at the front of the room.]
Actual: 5 min.	Display the sample topic on your monitor. In the first sentence under "Sentence too long" section, click a word that is highlighted

	in green: "The" or "teams". acrolinx IQ displays a menu. At the top of the menu is the error name, in this case "Sentence too long – 27 words." Select the error name and acrolinx IQ displays help text in a new browser window. What this help does not tell you is that the rule is triggered when a sentence contains more than 25 words. This limit can be adjusted lcocally by acrolinx IQ administrators but not by authors. At Symantec, the administrators implemented the 25-word limit, but the help text from acrolinx could not be customized to include that specification.
	Let's look at online help for the other rules.
	Practice
Do/Resources/Time	Say
Do:	Display the help for each of the rules and read the help provided.
Display help.	[Go around the room and have each learner read aloud the help for a rule. If the group is large, have the learners work in groups. Have each group display the help for a different rule.]
Resources:	
Sample topic in the CMS	Are there any questions before we move on?
Time:	
Scheduled: 5 min.Actual: 5 min.	
	Present Information and Examples
Do/Resources/Time	Say
Do: Introduce the Kohl book	The online help may provide enough clues for you to successfully rewrite the problem sentence. However, if the help does not "help," what do you do?
Resources:	As I mentioned earlier, <i>The Global English Style Guide</i> by John R. Kohl provides much more detailed guidelines for writing in the

 John Kohl's <i>The</i> Global English Style Guide (one for each learner) Time: Scheduled: 1 min. Actual: 2 min. 	Take out your copy of the book. Let's go to the index and see what we can find about "sentence too long." Under "sentence – length of," you can see that pages 34 and 35 cover the topic. Turn to p. 34 and you can see much more detail than acrolinx IQ help provides. What if you wanted to know what "disambiguate –ing words" meant and how to resolve the issue? Take a minute and use the Kohl book to find your answers.
	Practice
Do/Resources/Time	Say
Do: Locate information in the Kohl book about some of the style errors. Resources: John Kohl's <i>The Global English Style Guide</i> (one for each learner) Time: Scheduled: 2 min. Actual: 3 min.	Find information in <i>The Global English Style Guide</i> about how to "disambiguate –ing words." [Chapter 7, pp.133-160 is devoted to techniques for handling –ING words.] Are there any questions about the help or the Kohl text before you dig in and rewrite the problems sentences?
	Present Information and Examples
Do/Resources/Time	Say
Do: Rewrite the first sentence.	To get you started, we will correct the first sample sentence together.

	T
Resources:	
Time:	
Scheduled: 0 min.Actual: 0 min.	
	Practice
Do/Resources/Time	Say
Do:	Display the sample topic on your monitors.
• Fix the first sentence as a group activity.	[Instructor performs the same actions asked of the learner. The actions will be projected on the screen at the front of the room.]
Resources: Sample topic in the CMS Analysis report for the sample topic	Here's the first problem sentence, which we know from acrolinx IQ's error message is too long: "The audiences include IT (Information Technology) managers, application owners, IT finance teams, external compliance auditors, legal teams, line-of-business managers, external customers, IT architects, and capacity planning teams." You may be able to rewrite this sentence appropriately at this
John Kohl's <i>The Global English Style Guide</i> (one for each learner)	point. But let's say that you wanted some help to clarify the error message or to assist you in coming up with a solution. Display help. Raise your hand when you have displayed the help
	for this error.
Time:	Does the help really help? Could you resolve the issue
Scheduled: 5 min.Actual: 10 min.	If you want more information about this sort of error, where would you look in the Kohl book has to say about the error.
	[Learners may say "check the index or TOC" or "page 34-35"]
	As we saw earlier, Kohl discusses sentence length on pages 34 through 35.
	How would you rewrite the sentence?
	[Briefly, have one or two learner's offer their suggestions. Enter a

possible solution, then check the rewritten sentence with acrolinx IQ to see if the solution is error-free. If one of the learner's solutions is to create a list, move on to the rest of this practice activity.]

Here is one possible solution – create a list. acrolinx IQ does not include list items in the word count of the stem sentence. Your list items, of course, cannot exceed the 25-word limit.

[Enter in the following text in place of the sample sentence:

"The audiences for this material include the following functional roles:

- IT (Information Technology) managers
- Application owners
- IT finance teams
- External compliance auditors
- Legal teams
- line-of-business managers
- External customers
- IT architects
- Capacity planning teams"

Check the sentence with acrolinx IQ.]

And you can see that this solution does not generate an error and therefore satisfies the rule.

Present Information and Examples

Do/Resources/Time	Say
Do: Explain the exercise	Now you will have most of the remaining time to fix the rest of the errors.
Resources:	Fix as many of the remaining sentences as you can. You may ask me or anyone else in the room questions, but first use the online help and the Kohl book.
Sample topic in the CMSAnalysis report for the	You can recheck your fixes at any time by running an analysis on a corrected sentence, section, or the entire topic.
sample topic John Kohl's <i>The</i> Global English Style	At the end of the 30 minutes, I will ask you to run a final analysis on the topic you worked on, copy the report and paste it in an email

Guide (one for each learner) Time: Scheduled: 1 min. Actual: 2 min.	message, and send that message to me. You're not being individually graded or evaluated based on this report. Instead, I want to use the reports as one measure to see if the exercise and the references were effective. I'll also ask you to complete a brief survey to get your opinions about this activity. When I tell you that the time is up, you'll run acrolinx IQ one last time. Copy the resulting report and paste it into an email message and send the message to me.		
	Are there any questions about what we've discussed so far?		
	Are there any questions about the exercise?		
	Practice		
Do/Resources/Time	Say		
 Fix the remaining sentences. Resources: Sample topic in the CMS Analysis report for the sample topic John Kohl's <i>The Global English Style Guide</i> (one for each learner) 	Fix the remaining sentences. I will be available if you have any problems or questions. [Allow the learners 30 minutes to complete the activity. During this time, you can send an email message to each learner that contains the survey questions.] Okay, time is up! Now run a final analysis on the topic you worked on, copy the report and paste it in an email message, and send that message to me. I want to remind again that you are not being individually graded or evaluated based on this report. Instead, I want to use the reports as one measure to see if the exercise and the references were effective.		
Time: Scheduled: 30 min. Actual: 30 min.	Raise your hand after you have sent the report to me.		

Conclusion

	Summarize and Review	
Do/Resources/Time	Say	
Do:	We are at the end of this activity. Congratulations, you made it!	
Recap the activity.Resources:	I started this activity by saying that the objective was to improve your ability to successfully resolve style issues, using suggested reference materials, if needed. I hope this experience met that objective for you.	
 PowerPoint slide that lists objective and summarizes the activities. 	I want to review what we covered. We talked a bit about the importance of addressing style issues:	
Time: Scheduled: 2 min. Actual: 5 min.	If the content is consistent, English-language readers are more likely to understand it easily. Consistency also results in lower translation costs because human translators can translate content easily and quickly, and machine translation tools can translate text with greater accuracy.	
	We reviewed the Style section of the acrolinx IQ analysis report.	
	We reviewed how to locate style issues in topics, and I showed you a list of the ten most frequently violated style rules.	
	We talked about prioritizing the style issues you fix - according to number of occurrences, shown in the analysis report - so that you can make the most of your time while fixing the most number of problem sentences.	
	We briefly looked at the online help for style errors and at the Kohl book. and we talked about their use as reference material when you work on style issues.	
	And lastly, not leastly, you had some practice in fixing problem sentences that represented each of the most frequently violated style rules.	

Transfer Learning	
Do/Resources/Time	Say
Do: Explain some of the differences with using "live" topics rather than the sample topic.	When you get back to your offices, you will notice some similarities and some differences between what we did today to resolve the style issues in the sample sentences and what you will do in the future to fix your own style issues. You will use the same tools – Vasont, acrolinx IQ, XMetal, your laptop computer.
Resources: PowerPoint slide that lists differences and similarities with everyday work life. Time: Scheduled: 2 min. Actual: 2 min.	You will have the same references available to you – the online help, the Kohl book, the style guide (for what it's worth), your colleagues, the Internet, and any other reference you may be using now. You have a different physical environment. You will be working in your offices, from home, other conference rooms - occasionally this conference room, I suppose. (I do.) Perhaps the biggest difference – and I hope it's not that big of a difference – you will have different topics and content. The style issues will not be neatly organized as they are in the sample topic. Spelling, grammar, and terminology issues will be interspersed with the style issues. And you will have many topics, not just one, to write, analyze and correct. I suggest that you prioritize the style issues as we did in this activity so that you can have a plan of
	attack for researching and resolving the problems most efficiently.
	Remotivate and Close
Do/Resources/Time	Say
Do: • End the session. Resources: • PowerPoint slide that	I hope this experience has been helpful for you and that you can use the references to solve style problems and create better, clearly written content for our English-language readers, as well as help reduce costs by making our materials easier, faster, and cheaper to translate.
lists instructor's name, email address, and telephone number.	I would like your help by doing one more thing. While you were working on the sample sentences, I sent each of you an email message that contains a short survey about this learning activity. When you get back to your offices, please complete the survey and

Time:	send it back to me. This information will be valuable for future
Scheduled: 1 min.	presentations of this subject matter.
• Actual: 2 min.	You all know where my office is, so I cannot escape from any
	questions or comments you may have about style issues. Please
	feel free to contact me if you would like my help in resolving any
	acolinx IQ issue, whether they be style, spelling, grammar, or
	terminology problems.
	Thank you all for participating! Enjoy the rest of the day!

Assessment

Conduct Assessment				
Do/Resources/Time	Say			
Do: Compile results from learner's final analysis reports.	[Review the returned analysis reports and consolidate the results. Record which sentences were completed successfully and the overall final score for each student.]			
Resources: Learner's final analysis reports				
Evaluate Feedback and Seek Remediation				
Do/Resources/Time	Say			
Do:	[Review the survey responses from each student.]			
Compile survey results.Resources:Survey responses	[Based on the results of the activity, the survey responses, and observations of the instructor, determine if components of the instructional strategy need changes and plan for any revisions. (See 4.3 Plan for Revising Instructional Materials.]			

Appendix B – PowerPoint Slides

[Double-click the object below to launch a PowerPoint slide show.]



How to address style issues in your content

Jeff Huset

Senior Information Developer

1

Appendix C - Sample Sentences

The following list contains the most frequently violated style rules and provides two example sentences from the team's content. These sentences are used in the instructional activity for *Objective 3: Address sentence-level style issues*.

1. sentence_too_long

- a. The audiences include IT (Information Technology) managers, application owners, IT finance teams, external compliance auditors, legal teams, line-of-business managers, external customers, IT architects, and capacity planning teams.
- b. When you select this report on the Saved Reports tab, the report is displayed with the saved filters and in the report view that were selected while saving the reports, with respect to the current time.

2. use_relative_pronoun

- a. Select Geography to view information about master servers located in a particular geography like Europe or Asia.
- b. This column lists the name of the policy associated with the job.

3. avoid_future_tense

- a. Refrain from multiplexing backups that will be synthesized.
- b. When you change the settings and preferences they are saved and if you log out and log on again these settings will be used.

4. disambiguate_ing_words

- a. The following procedure is required for Instant Recovery backups when using the full-sized or space-optimized instant snapshot options in VxVM 4.0.
- b. Stops all NetBackup daemons after detecting an unexpected offline operation or an ineffective online operation.

5. use_articles

- a. nbu_snap does not support VxVM volumes that belong to a shared disk group.
- b. You might need to add drivers to support hardware that is not included by default in SUSE Linux Enterprise Server 10.1.

6. use_this_that_with_noun

- a. That is the only EVA disk array method that supports Instant Recovery.
- b. This applies to all multinode storage pools, whether they are clustered or unclustered.

7. avoid_progressive_tense

- a. If the array disks you are using are not under PowerPath control on Solaris, Linux, or Windows, configure only one path from your host to the array.
- b. The group that is being restored has a link dependency on a member that does not exist yet.

8. avoid_passive

- a. Any available LUN can be added to the reserved LUN pool if the LUN is owned by the storage processor that owns the source LUN.
- b. Report.log is the default name for this file when it is generated by an OpenLDAP server.

9. avoid_parenthetical_expressions

- a. To discover all the disk groups, including deported ones, enter the following command:
- b. If the window opens and closes before D_inc1 is due, depending on the duration of the other windows, NetBackup may run another schedule before D_inc1.

10. repeat_head_noun

- a. The table and pie charts include links to filtered detail views.
- b. Type the name of the path in the Pathname or Directive field.

Appendix D - Topic with acrolinx IQ Errors, Menu, and Help

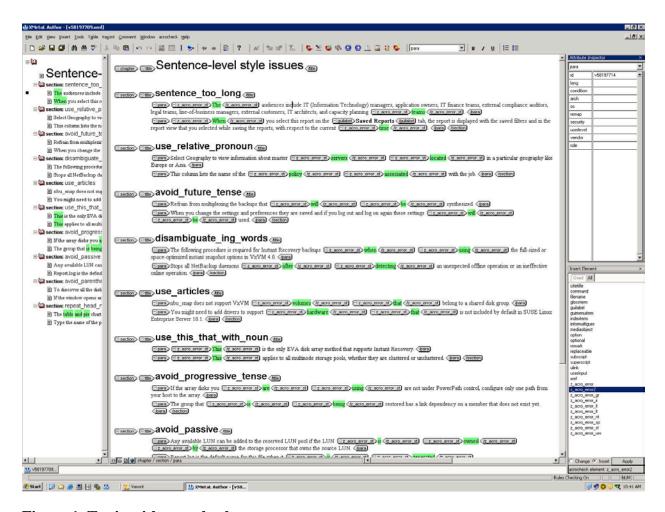


Figure 1. Topic with acrocheck errors

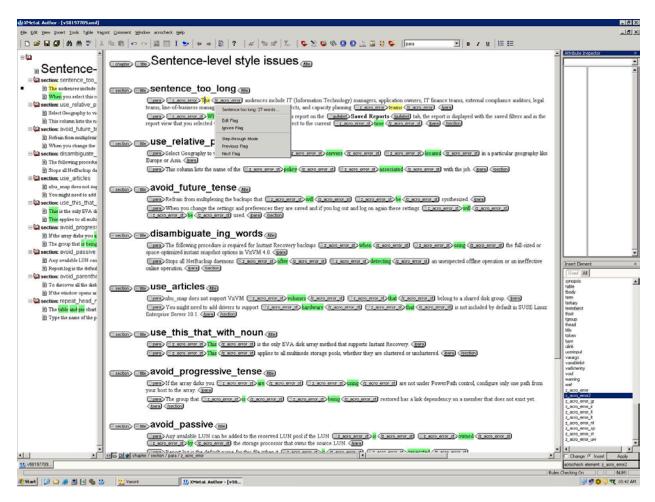


Figure 2. Topic with acrocheck error menu

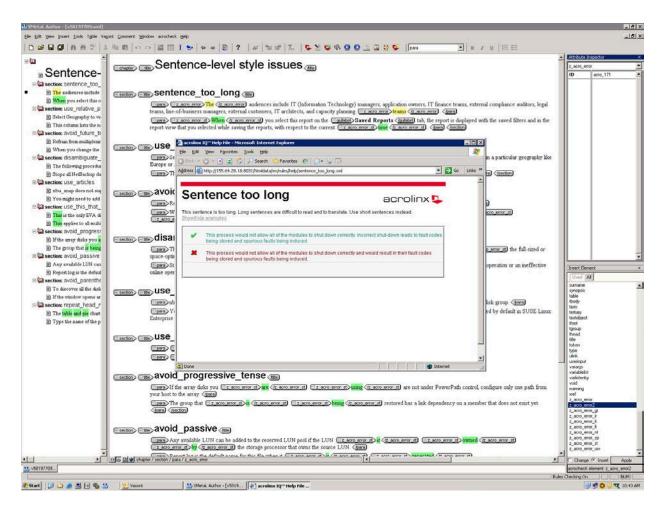


Figure 3. Topic with acrocheck error help

Appendix E – acrolinx IQ Content Analysis Report for Sample Sentences

acrolinx IQ Checking Report



Settings and Result Overview ▼Show | Hide

	Status	Results	Score
[⊻] Spelling	✓	0	0
y Grammar	✓	0	0
⊌ Style	✓	20	539
[⊿] Terminology	✓	0	0
⊾Reuse	×		
^y New terms	x		

Administrative Information ▼Show | Hide

User name

License ID	Symantec / J	
License edition	acrolinx IQ	
Version information	Plug-in: 1.0 (Build: 755) / Server: 2.2 (Build: 2704)	
Resources	Symantec : 2.2 (build: 998 / 2010-12-10)	
File Name	file://E:/extracts/Jeffrey_Huset/v58197709/v58197709.xml	
File format	application/XML	

Checking Information ▼Show | Hide

Date and time of check	Fri Apr 22 10:36:07 PDT 2011
Document language	English
Rule set	SymantecAll

Term sets used	Legal_Standard
Checking Scope	371 word(s) / 31 sentence(s)
Checking Status	•(Score: 539; green < 100, yellow 100 - 199, red ≥ 200)
Flesch Reading Ease	
rieson Reading Lase	39.9

Spelling ▼Show | Hide

No results found.

Grammar ▼Show | Hide

No results found.

Style ▼Show | Hide

Summary

sentence_too_long	2
use_relative_pronoun	2
avoid_future_tense	2
disambiguate_ing_words	2
use_articles	2
use_this_that_with_noun	2
avoid_progressive_tense	2
avoid_passive	2
avoid_parenthetical_expressions	2

repeat_head_noun 2

Details

SOrder by Rule

*sentence_too_long

The audiences include IT (Information Technology) managers, application owners, IT finance teams, external compliance auditors, legal teams, line-of-business managers, external customers, IT architects, and capacity planning **teams**.

+sentence_too_long

When you select this report on the Saved Reports tab, the report is displayed with the saved filters and in the report view that you selected while saving the reports, with respect to the current time.

→use_relative_pronoun

Select Geography to view information about master **servers located** in a particular geography like Europe or Asia.

→use_relative_pronoun

This column lists the name of the **policy associated** with the job.

→avoid_future_tense

Refrain from multiplexing the backups that will be synthesized.

→avoid_future_tense

When you change the settings and preferences they are saved and if you log out and log on again these settings will be used.

+disambiguate_ing_words

The following procedure is required for Instant Recovery backups **when using** the full-sized or space-optimized instant snapshot options in VxVM 4.0.

disambiguate_ing_words

Stops all NetBackup daemons after detecting an unexpected offline operation or an ineffective online operation.

+use_articles

nbu_snap does not support VxVM volumes that belong to a shared disk group.

→use_articles

You might need to add drivers to support **hardware that** is not included by default in SUSE Linux Enterprise Server 10.1.

→use_this_that_with_noun

This is the only EVA disk array method that supports Instant Recovery.

→use_this_that_with_noun

This applies to all multinode storage pools, whether they are clustered or unclustered.

*avoid_progressive_tense

If the array disks you **are using** are not under PowerPath control, configure only one path from your host to the array.

→avoid_progressive_tense

The group that is being restored has a link dependency on a member that does not exist yet.

+avoid_passive

Any available LUN can be added to the reserved LUN pool if the LUN is owned by the storage processor that owns the source LUN.

+avoid_passive

Report.log is the default name for this file when it is generated by an OpenLDAP server.

+avoid_parenthetical_expressions

To discover all the disk groups, including deported ones, enter the following command:

*avoid_parenthetical_expressions

If the window opens and closes before D_inc1 is due, **depending** on the duration of the other windows, NetBackup may run another schedule before D_inc1.

+repeat_head_noun

The table and pie charts include links to filtered detail views.

+repeat_head_noun

Type the name of the path in the **Pathname or Directive** field.

Terminology ▼Show | Hide

No results found.

Appendix F - Excerpt from The Global English Style Guide

Figure 4. Excerpt from The Global English Style Guide

34 The Global English Style Guide: Writing Clear, Translatable Documentation for a Global Market

ome long sentences are very difficult to divide or shorten. In the following example

German, followed by a literal, word-for-word English translation:

```
Ich erwartete nicht, dass ich die Tagung hätte
I expected not, that I the conference would have beiwohnen können.
attend be able to.
```

Obviously, you cannot change the sequence of words or ideas in English in order to accommodate readers from other language backgrounds. But if you express yourself simply and eliminate unnecessary obstacles, you can greatly facilitate the reading and translation processes.

3.1 Limit the length of sentences

Priority: HT1, NN1, MT1

Short sentences are less likely than long sentences to contain ambiguities and complexities that impede translation and reduce readability. For procedural (task-oriented) information, limit your sentences to 20 words. For conceptual information, strive for a 25-word limit.

Here are two examples of long sentences that can easily be divided into shorter sentences:

- X If Chocolate Bits is set to No, indicating that there are no chocolate bits in the sample batch of ice cream, then the selections for Enough Bits and Size of Bits are grayed to prevent users from entering irrelevant data. (40 words)
- ✓ If Chocolate Bits is set to No, then there are no chocolate bits in the sample batch of ice cream. Therefore, the selections for Enough Bits and Size of Bits are grayed to prevent users from entering irrelevant data. (20 words + 19 words) = 39 words)
- X With design-time controls, you control the look and feel of your Web pages in a WYSIWYG editor environment, and at the same time use all the functionality of SAS/IntrNet software in your Web pages. (35 words)
- ✓ With design-time controls, you control the look and feel of your Web pages in a WYSIWYG editor environment. In addition, you can use all the functionality of SAS/IntrNet software in your Web pages. (19+15 = 34 words)

Some long sentences are very difficult to divide or shorten. In the following example, the technical writer who received the sentence from a subject-matter expert had to study the context for half an hour. Only then did she understand the sentence well enough to divide and simplify it.

Chapter 3 . Simplifying Your Writing Style 35

X The log shows the Uninitialized variable warning for any variable whose value comes from ISPF services when the variable has no initial value and does not appear on the left side of the equal sign in an assignment statement. (39 words)

Sentences like this one pose the biggest problem for translators. If the document in which the above sentence appears must be translated into ten languages, then ten different translators must struggle to understand the sentence. What are the chances of them all producing clear, accurate translations when they are given such impenetrable source material? If the subject matter were nuclear reactors instead of software, unclear source texts and mistranslations could be catastrophic.

Fortunately, the writer used her understanding of the subject matter to completely reorganize and clarify the information:

If a variable has no initial value and does not appear on the left side of the equal sign in an assignment statement, then the ISPF service assigns a value to the variable. However, because the value was not assigned in a statement, the log shows the Uninitialized variable warning. (33 + 17 = 50 words)

In the revision, the first sentence still exceeds the 25-word limit for conceptual information, but it is divided into two clauses, each of which is unambiguous. The second sentence adds two clauses (and 17 words), but it includes a useful added explanation, and the word *However* makes the logical relationship between the sentences clear. The total word count increased from 39 words to 50 words, but the revision was necessary in order to make the information comprehensible (even to native speakers) and translatable.

The revision illustrates the importance of being flexible with regard to sentence lengths. A long sentence might be clear and reasonably translatable if the following conditions are true:

- The sentence consists of more than one clause. (However, avoid including more than two clauses in a sentence.)
- Each clause conforms to all of the other Global English guidelines.
- The logical relationship between the clauses is clear.