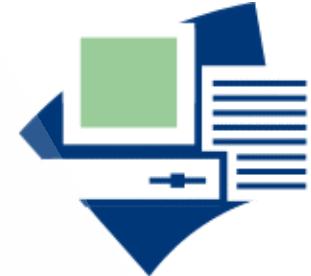


# E-LEARNING DESIGN FORMS



For designing, specifying, and documenting e-learning.

16 November 2006

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## LICENSE

We will dispense with the legal gobbledegook and keep it simple:

- These forms are the intellectual property of William Horton Consulting, Inc. We own them and you do not. We give you permission individually to use them for your own purposes.
- You cannot share them with colleagues, give them to friends, or sell them on E-bay. Any questions, e-mail us first, OK?
- You own whatever you fill into the forms. You can give a filled-in form to others to review but they cannot strip out your content and just use the form for their purposes.

We guarantee nothing about these forms. If you come in one morning and your computer has turned into a jellyfish, don't blame us.

## OVERVIEW

This document contains the E-Learning Design Forms. This document serves several functions. It contains the forms, which you can cut and paste into your own design specification. This document can also serve as a template from which you create your specifications by just editing a copy of this document. Finally, this document also contains the styles and AutoText to simplify inserting and formatting the design forms.

### Forms and design aids

At William Horton Consulting, we have created a suite of design forms to guide the development process and record and share design decisions. These forms, which are available at horton.com, are keyed to specific units of knowledge products and specific points in the development process.

Before you begin looking at forms, it is important to understand the role of forms in the development method. Forms are not a magic bullet and filling in forms does not ensure good design. But filling in forms can lead us to ask better questions, to communicate more fully, and to learn from our successes and mistakes.

The purpose of these forms is to record design decisions. By doing so, we produce a tangible design that we can build on. Successes can be proliferated to other projects. Mistakes can be corrected and the correction specified for all to use.

Design forms are extremely valuable to communicate design decisions to those who carry them out, especially to direct the work of subcontractors or employees. For subcontractors, design forms can become an integral and definite part of the work assignment, thus reducing later disputes about what was called for. They can ensure consistency among the work of different groups, especially those working independently, using different tools, and producing different parts of the knowledge product.

The most important role of design forms is that they remind us to ask critical questions. The blank box on the form nags and whines until we satisfy it. It makes sure that we at least think about critical issues in time to act on them.

### Why use the forms

Filling in forms is a lot of work and is not much fun. It hardly seems creative. Yet it can save you time, effort, frustration, and disappointment. It can ensure that everyone on the project is working to a common purpose.

## What do forms do for you?

These forms guide and safeguard your efforts before, during, and after the project.

- **Forms cover your assets.** By recording your ideas on dated forms carrying your copyright notice, you protect your valuable intellectual property.
- **Forms capture your experience.** By recording your designs and revisions of them, you have a clear trail of thought. You can learn from your mistakes, and even more importantly, from your successes.
- **Forms impress clients.** A completely and clearly documented design cannot but impress a client who is nervous about all the billable hours you have incurred with nothing flashing on the screen to show for it.
- **Forms fully disclose designs.** By completely documenting your designs, you cannot be accused of hiding things from the client or sneaking in surprises at the last moment. Nervous attorneys can see all the text that will appear in the user-interface, regardless of how deeply it may be buried.
- **Forms focus attention on high-level details.** Forms require you to express your design ideas concisely. To fit your ideas onto a single page, you must discard nonessential ideas and concentrate on the essence of your plan.
- **Forms let you, not your tools, do the design.** Because forms are completed in simple technology, they are not restricted to ideas that work well with one particular tool or that match the capabilities of a particular vendor. You can design first, and then pick the tools and vendors to help realize your design.
- **Forms eliminate inappropriate creativity.** By specifying the essential requirements of a design, the form constrains those who will create it. While not limiting their creativity to execute the design in the best way possible, the form fully specifies the design in sufficient detail that there should be no surprises or excuses when the product is constructed.
- **Forms prompt good decisions.** Forms require you to at least think about the critical design issues. Although the form cannot guarantee you get the answer right, it can ensure that you do not forget to consider any crucial factor.

## What forms do not do for you

Forms are not a panacea. They cannot think, critique, discuss, brainstorm, ponder, analyze, guess, or learn.

## Forms do not design

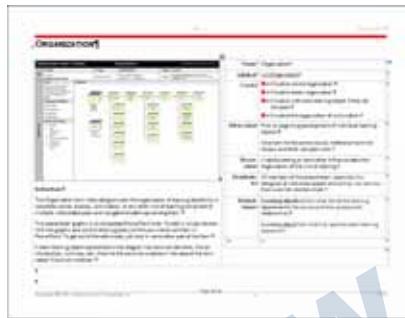
Merely writing text and sketching pictures into the boxes on a form is not design. It is easy to accumulate a stack of filled-in forms and think you have accomplished something.

## Forms do not decide

Forms can prompt you to make decisions and forms can record those decisions, but forms cannot make decisions for you. Nor can they ensure that the decisions you do make are good ones.

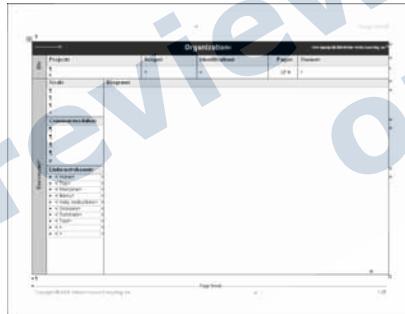
## How are the forms organized

Each form is presented on four pages. Here is what each page contains:



### Overview page

This page introduces the form, lists the AutoText entries, tells you where to use it, provides instructions on how to use it, and lists related forms.



### Blank form

The first version of the form is completely blank. Use this version to print out a paper form that you can fill in with pen or pencil as you gather your notes.

This is also the version to use when modifying the form to create your own version.

You can use the autotext item whcXXXXBlank to insert this form where XXXX is the name of the form. For example, whcOrganizationBlank would insert a blank Organization form.



### Placeholder form

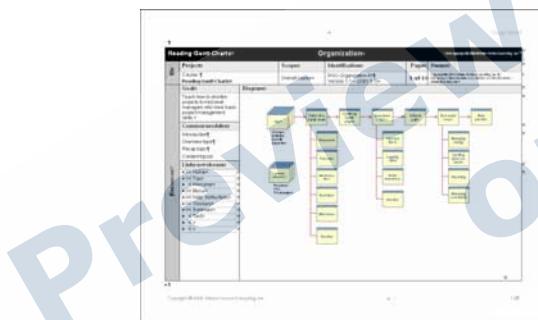
The second version of the form contains placeholders for the content you will insert into the form. These placeholders suggest the type of information to put into each slot.

The placeholder form contains two types of placeholders: text and graphic. The text placeholders are just bits of text that you replace with your own text. To select an individual word, double-click it. To select an entire paragraph, triple-click it.

The second kind of placeholder is a graphic. It is an embedded PowerPoint slide. To edit it, double-click the graphic and edit it as you would any other PowerPoint slide.

Remember to delete unused placeholder text after you complete a form.

You can use the autotext item whcXXXX to insert this form where XXXX is the name of the form. For example, whcOrganization would insert an Organization form with placeholders.



### Example form

The third version is an example of the form filled in with realistic information. Use this example to help you understand how to fill in the slots on the form.

You can use the example as a template, too. Sometimes the example may come closer to the way you want to fill out the form than the placeholder version does.

## INSTRUCTIONS FOR USING THESE FORMS

You can use these forms in two ways. You can print out the blank version of a form and complete it off-line. Or, you can also add these forms to your own design document and complete them directly in Microsoft word. If you choose to use these forms directly in Microsoft word, the following instructions will help you.

### How to include forms in your design documents

You may place these forms in your own design document. To do that, you must first set up your design document to ensure that the forms display correctly within it. To do that:

1. Set the layout of your document to *landscape*.
2. Set the top, bottom, left, and right margins of your document to .75 inches.

Now you can add forms either by cut-and-paste or AutoText. Read on for more detailed instructions.

### Important: Set your display to show paragraphs and line breaks

You can save yourself a lot of frustration and rework by changing how you display your document. Turn on the display of paragraph marks, line breaks, and other invisible characters.

Invisible characters hidden

<b>Resources</b>					
	<b>Knowledge assets</b>				
	Slides				
	Handouts				
	Video or audio				
	Documents				
	Other				

Invisible characters showing

<b>Resources</b>	■	☒	☒	☒	☒
	<b>Knowledge assets</b>	☒			
	Slides	☒			
	Handouts	☒			
	Video or audio	☒			
	Documents	☒			
	Other	☒			

Reading Gantt Charts

Project	
Course:	
Reading Gantt Charts	
Client or sponsor	Budget
The Gantt Group, Inc.	\$0.00

Reading Gantt Charts

ID	Project	
	Course:	¶
	Reading Gantt Charts	
Client	Client or sponsor	Budget
	The Gantt Group, Inc.	\$0.00

To show paragraph marks and other invisible characters, click the Show/Hide Paragraphs button on the standard toolbar. It looks like this:



Click it again to hide paragraph marks.

Displaying these normally hidden marks will make it much easier for you to insert forms, to write information into the forms, and to delete line breaks and other formatting characters you do not need.

To control exactly what is shown and hidden, select Tools → Options → View and specify which formatting characters you want to see.

---

## Adding forms using cut and paste

You can add forms to your document using the cut-and-paste method. Here are the steps to follow:

1. Ensure that a version of this template document and your design document are open. We recommend opening a copy of this template file so as not to over-write the forms or AutoText unintentionally.
2. Select the entire form and the page-break before the form.
3. Select **Edit → Copy**, or type **Ctrl-C**.
4. In your document, place your cursor where you want the form to appear.
5. Select **Edit → Paste**, or type **Ctrl-V**.

---

## Adding forms using AutoText

Using Microsoft Word's AutoText feature streamlines the process of adding forms to your project. This file, *Horton\_ELearning\_Forms.dot*, contains AutoText entries for the Placeholder forms and the Blank forms. If you are unfamiliar with AutoText, take a look at the Help for Microsoft Word and search for "AutoText." Here are the steps to follow:

1. Open a new document and attach this file, *Horton\_ELearning\_Forms.dot*, as its template. If you do not know how to do that, see page 12 for more about attaching templates.
2. In your document, place your cursor where you want the form to be inserted.
3. Select **Insert → AutoText → AutoText**.
4. In the AutoCorrect dialog box, choose the **AutoText** tab.
5. Type the AutoText entry from each form's instructions into the text box, or choose the AutoText entry from the scrolling list. You will see a preview of the form in the Preview area.
6. Select **Insert**.
7. The form will appear in your document.

---

## Basic Word skills

Here are the types of task you will need to perform in order to use these forms. If you are unsure how to perform any of these tasks, use the Microsoft Word Help file.

## Filling in blanks

We have tried to make filling form blanks easy.

**For blank forms:** Place your cursor in a blank and begin typing.

**For placeholder forms:** Placeholder forms contain hints to help you decide what kind of content should be entered. To edit the placeholder text, double-click single words, such as NameOfPerson and begin typing. To select a whole paragraph of text or a whole cell, simply triple-click some of the placeholder text.

## Making forms start on a new page

Some of these forms may not fill an entire page. To ensure that any additional forms you add to your design document start on a new page, insert a page break before adding a new form. To do so:

1. Select **Insert → Break...**
2. From the Break dialog box, choose **Page break** from Break types.

## Editing embedded PPT graphics

Some of our forms have embedded PowerPoint slides that are used for diagrams. As long as you have Microsoft PowerPoint installed, you can easily edit them just like you edit any PowerPoint slide. To begin editing, you must activate the embedded slide. There are two ways to do that:

1. Double-click the embedded slide. PowerPoint will start up in the background and the embedded slide will appear within a wide gray border.
2. Right-click the embedded slide and choose **Slide object → Edit**. As with method 1, the embedded slide will appear within a wide gray border.

Now you can edit the slide using familiar Microsoft office tools. When you are finished, simply click outside the slide in the margin of the word document.

## Tables within tables

These forms use tables within tables, a feature available in Microsoft Word XP and above. Working with nested tables can be a bit tricky. You need to be sure what table you are editing when you wish to add or delete rows. Tables are easy to identify. When you hover over a table you will see  at the upper-left corner of the active table. Once you have identified the table you wish to edit, simply use the **Table → Insert** command, and then add or delete rows or columns.

## Attaching as a template

Once you become familiar with these forms you may want to use this template as—well, a template. Here is how to do that:

1. Save a copy of this file and name it *Horton\_EL\_Forms\_Template.dot*, or anything you wish to name it.
2. Open this new template and type Ctrl-A to select all the content in the file and delete it.
3. Save your new template.
4. Place this template file into your Microsoft Word template directory.

This directory can be in one of several places. For those using Windows XP, the directory is likely to be: C:\Documents and Settings\[nameOfTheAdministrativeUser]\Application Data\Microsoft\Templates. If this folder does not exist or does not contain a file called normal.dot, then there is another method to use to find where Word is hiding its templates—search for it.

- a. From the **Start** menu, choose **Search**.
  - b. In the Search window, select **All files and folders**.
  - c. Type *normal.dot* into the first blank field.
  - d. Choose **More advanced options**.
  - e. Place a check mark in the first three options (Search system folders, Search hidden files and folders, Search subfolders).
  - f. Choose **Search**.
  - g. Take note of where *normal.dot* is located and place your new template file in the same folder.
5. Open Microsoft Word.
  6. Choose **File → New**
  7. In the new Document panel, choose **On my computer...** under the **Templates** heading.
  8. In the Templates dialog box on the **General** tab, choose your new template.

Using AutoText, you are ready to begin creating your new design document.

# PROJECT FORM

Project				
<b>ID</b>	Project Course: <b>Reading Gantt Charts</b>	Scope Entire course	Identification RGC-Project-01 Version 1.1 – (2003.5.1)	Page 1 of 1
<b>Project</b>	<b>Client or sponsor</b> the Gantt Group, Inc. Martha Legare 6475 East Joy Rd. Ann Arbor, MI 48105-9680	<b>Budget</b> \$XX.XXX USD	<b>Management support</b> Project authorized by Martha Legare.	<b>Due</b> When: 1 April 2001 Where: Ann Arbor To whom: Martha Legare Format: CD-ROM of Web site
<b>Goals</b>	<b>Enterprise goals</b> Attract more clients for the Gantt Group.	<b>Performance goal</b> Potential clients for the Gantt Group will recognize that understanding Gantt Charts can help them better manage projects and that the Gantt group can provide that expertise.	<b>Project goal</b> Teach mid-level managers to shorten projects by interpreting Gantt Charts.	
<b>Requirements</b>	<b>Economic</b> Because this course will be offered for free, it must not cost much to create and be nearly maintenance free—by non-technical owners.	<b>Media</b> No media server.	<b>Technical</b> Learners must be able to self-register.	
<b>Team</b>	<b>Customer representatives</b> Person: Martha Legare Position: CEO, Gantt Group	<b>Management</b> Financial Project: Kit Horton	<b>Design</b> Instructional design: William Horton Media design: William Horton	<b>Production staff</b> Writing: William Horton Illustrating: Kandyba Animation: Kit Horton Sound: Kit Horton Video: Kit Horton
<b>Resources</b>	<b>Knowledge assets</b> Slides: PowerPoint presentation on chart conventions Handouts: Class notes Video or audio Documents: Videotape of lectures Other: Text books on the subject Quizzes and exams from classroom courses	<b>Subject-matter experts</b> Person: Kelly Kalmes Expertise: Gantt Chart fundamentals	<b>Technical specialists</b> Authoring tools: Kit Horton Programming Integration: William Horton Kit Horton	

## Instructions

Use the Project form to summarize top-level information about a project. Link to other forms and documents to provide more complete information or to elaborate on entries on the Project form.

**AutoText** whcProject, whcProjectBlank

- Use to**
- Define the charter of the project.
  - Record details.
  - Ensure commitment.
  - Supplement a written contract.

**Fill in when** First starting a project. Maintain one form per project.

**Revise when** The scope, nature, or personnel of a project changes.

**Distribute to** Managers, supervisors, and team leaders on a project. Before doing so, you may want to remove financial information.

**Related forms** **Learners** form for each group educated.

**Learning Objectives** form for the learning objectives necessary for the project goal.

				<b>Project</b>	Form copyright © 2005 William Horton Consulting, Inc.	
<b>ID</b>	<b>Project</b>		<b>Scope</b>	<b>Identification</b>		<b>Owner</b>
<b>Project</b>	<b>Client or sponsor</b>	<b>Budget</b>		<b>Management support</b>		<b>Due</b> When Where To whom Format
<b>Goals</b>	<b>Enterprise goals</b>		<b>Performance goal</b>			<b>Learning goal</b>
<b>Needs</b>	<b>Economic</b>		<b>Media</b>		<b>Technical</b>	
<b>Team</b>	<b>Customer representatives</b> Person   Position	<b>Management</b> Financial   Project		<b>Design</b> Instructional design Media design		<b>Production staff</b> Writing Illustrating Animation Sound Video
<b>Resources</b>	<b>Knowledge assets</b> Slides Handouts Video or audio Documents Other			<b>Subject-matter experts</b> Person   Expertise	<b>Technical specialists</b> Authoring tools Programming Integration	

<b>ProjectTitle</b>				<b>Project</b>				Form copyright © 2005 William Horton Consulting, Inc.	
<b>ID</b>	<b>Project</b>		<b>Scope</b>	<b>Identification</b>			<b>Owner</b>		
	TypeProject: <b>FullProjectTitle</b>		WhereThisFormApplies	XXX-Project-nn Version n.n – (date)			Copyright © year CopyrightOwner' Address PhoneNumber EMailAddress		
<b>Project</b>	<b>Client or sponsor</b>		<b>Budget</b>		<b>Management support</b>		<b>Due</b>		
	SponsorRepresentative	SponsorOrganization	SponsorAddress	SponsorPhone	\$XX.XXX USD	Role: NameOfPerson. Role: NameOfPerson. Role: NameOfPerson. Role: NameOfPerson.	When Date Where CityOrOffice To whom NameOfPerson Format PhysicalFormat		
<b>Goals</b>	<b>Enterprise goals</b>		<b>Performance goal</b>			<b>Learning goal</b>			
	What the organization hopes to accomplish.		What people must do differently in order to accomplish the enterprise goal. Specify how they must manifest new behaviors, skills, and attitudes.			What specifically this project will accomplish to contribute to the performance goal.			
<b>Needs</b>	<b>Economic</b>			<b>Media</b>		<b>Technical</b>			
	Restrictions on the financing of the project such as the size of the budget, cash-flow milestones, or expectations for return on investment.			Limitations on what media may be used, such as which formats are allowed, forbidden, or required.		Requirements and restrictions on specific technical capabilities or the use of certain technologies.			
<b>Team</b>	<b>Customer representatives</b>		<b>Management</b>		<b>Design</b>		<b>Production staff</b>		
	Person NameOfPerson	Position RoleOrTitle	Financial Project	NameOfPerson NameOfPerson	Instructional design Media design	NameOfPerson NameOfPerson	Writing Illustrating Animation Sound Video	NameOfPerson NameOfPerson NameOfPerson NameOfPerson NameOfPerson	
<b>Resources</b>	<b>Knowledge assets</b>				<b>Subject-matter experts</b>		<b>Technical specialists</b>		
	Slides Handouts Video or audio Documents Other	DescriptionOfThisAsset	DescriptionOfThisAsset	DescriptionOfThisAsset	DescriptionOfThisAsset	Person NameOfPerson NameOfPerson NameOfPerson	Expertise TheirExpertise TheirExpertise TheirExpertise	Authoring tools Programming Integration	NameOfPerson NameOfPerson NameOfPerson

Reading Gantt Charts				Project		Form copyright © 2005 William Horton Consulting, Inc.	
<b>ID</b>	<b>Project</b>		<b>Scope</b>	<b>Identification</b>		<b>Owner</b>	
	Course: <b>Reading Gantt Charts</b>		Entire course	RGC-Project-01 Version 1.1 – (2003.5.1)		Copyright © 2003 William Horton Consulting, Inc. 838 Spruce Street, Boulder, CO, 80203 +1.303.545.6964 william@horton.com	
<b>Project</b>	<b>Client or sponsor</b>		<b>Budget</b>	<b>Management support</b>		<b>Due</b>	
	The Gantt Group, inc. Martha Legare 6475 East Joy Rd. Ann Arbor, MI 48105-9680		\$XX.XXX USD	Project authorized by Martha Legare.		<b>When</b> 1 April 2001 <b>Where</b> Ann Arbor <b>To whom</b> Martha Legare <b>Format</b> CD-ROM of Web site	
<b>Goals</b>	<b>Enterprise goals</b>		<b>Performance goal</b>			<b>Learning goal</b>	
	Attract more clients for the Gantt Group.		Potential clients for the Gantt Group will recognize that understanding Gantt Charts can help them better manage projects and that the Gantt group can provide that expertise.			Teach mid-level managers to shorten projects by interpreting Gantt Charts.	
<b>Needs</b>	<b>Economic</b>			<b>Media</b>		<b>Technical</b>	
	Because this course will be offered for free, it must not cost much to create and be nearly maintenance free—by non-technical owners.			No media server.		Learners must be able to self-register.	
<b>Team</b>	<b>Customer representatives</b>	<b>Management</b>	<b>Design</b>			<b>Production staff</b>	
	Person Position Martha Legare CEO, Gantt Group	Financial Project Kit Horton	Instructional design Media design	William Horton	William Horton	Writing Illustrating Animation Sound Video	William Horton Kandyba Kit Horton Kit Horton Kit Horton
<b>Resources</b>	<b>Knowledge assets</b>			<b>Subject-matter experts</b>		<b>Technical specialists</b>	
	Slides Handouts Video or audio Documents Other	PowerPoint presentation on chart conventions Class notes Videotape of lectures Text books on the subject Quizzes and exams from classroom courses			Person Expertise Kelly Kalmes Gantt Chart fundamentals	Authoring tools Programming Integration	Kit Horton William Horton Kit Horton

# LEARNERS

Learners					
Form copyright © 2005 William Horton Consulting, Inc. 835 Spruce Street, Boulder, CO, 80303 • +1.303.545.6964 will@horton.com					
<b>ID</b>	<b>Project</b> Course: <b>Reading Gantt Charts</b>		<b>Scope</b> Entire course	<b>Identification</b> RGC-Consumers-01 Version 1.1 – (2003.5.1)	<b>Page</b> <b>1 of 1</b>
<b>Learners</b>	<b>Description</b> Middle and upper managers who need to read and interpret Gantt charts. Typically supervise those who actually construct the Gantt charts. <b>Portion of total audience:</b> 100%				
<b>Goals</b>	<b>What do they hope to gain?</b> Learn to interpret Gantt charts, especially how to use them to make better decisions regarding the scheduling and supervision of complex projects		<b>Why do they take the learning?</b> 65% To accomplish current job Required by boss 20% To qualify for new job To pass certification test 15% Curiosity & self-improvement Other <b>Financial involvement</b> Paid for time learning? Yes Costs they pay themselves: (none)		
<b>Where</b>	<b>When will they learn?</b> 85% Normal work hours 5% Evenings 10% Weekends Other	<b>Where will they learn?</b> 60% Private office 30% Cubicle Factory floor Training center 5% Hotel 15% Home Other:	<b>Geographic distribution</b> All in one building All on one campus All in one city 60% All in one country over 24 time zones 40%	<b>Environment</b> <b>Space:</b> No room for more than one piece of paper beside the computer <b>Lighting:</b> OK <b>Noise:</b> Normal office noise with frequent interruptions (every 10 minutes or so)	
<b>Abilities</b>	<b>Computer skills</b>		<b>Language skills</b>	<b>Typing</b>	<b>Disabilities</b>
	X E-mail X Web browser X Word processor X Other desktop applications Discussion forums		Chat and messaging Install software Writing macros Programming	Reading 10 <sup>th</sup> Grade level Writing 10 <sup>th</sup> Grade level Languages English 60% 1 <sup>st</sup> language 40% 2 <sup>nd</sup> language	E-mail 15 quality words/min Letter 10 quality words/min None beyond those implied by the demographics of learners. Note: This course is not required to comply with Section 508 or W3C WAG
<b>Technology</b>	<b>Hardware</b>		<b>Software</b>	<b>Network connection</b>	
	Processor P2 100+ MHz Memory 24 MB Display size 800 x 600 Colors Thousands		Disc CD-ROM 4X Audio out 16-bit Audio in (none) Video in (none)	OS Windows 98 Browser IE 4+, NS 4+ Players Flash 4 Applications MS Project	% 60% Intranet 20% Broadband 20% Dialup - Wireless Type Up 1 M Down 1 M Cost -

## Instructions

Use the Learners form to help you analyze the users of your learning product. This form asks why learners are taking your learning, where they will access it, when they will do so, their level of computer skills, and their language skills. The information you gather here will help you better fit your learning product to their needs.

**AutoText** whcLearners, whcLearnersBlank

**Use to** Identify a group of learners for whom you are designing e-learning. The group should have similar characteristics.

**Fill in when** At the beginning of a project after completing the Project form. Fill in one form per each group of learners targeted.

**Revise when** Nature of a group of learners change.

**Distribute to** Managers, supervisors, team leaders, instructional designers, media-producers, and subject-matter experts.

**Related forms** Project form that describes the project involving this group of learners.

				Learners	Form copyright © 2005 William Horton Consulting, Inc.			
ID	Project		Scope	Identification		Owner		
Learners	Description		Job function	Education	Experience	Demographics		
						Age range Gender mix Nationality		
	Portion of total audience: %	Time value: per						
Goals	What do they hope to gain?		Why do they take the learning?			Financial involvement		
			To accomplish current job Required by boss To qualify for new job To pass certification test			Paid for time learning? Costs they pay themselves:		
Where	When will they learn?	Where will they learn?	Geographic distribution		Environment			
	Designated times Normal work hours Evenings Weekends Other	Private office Cubicle Factory floor Training center Hotel Home Other:	All in one building All on one campus All in one city All in one country over ___ time zones		Space Lighting Noise			
Abilities	Computer skills		Language skills		Typing	Disabilities		
	E-mail Web browser Word processor Other desktop applications Discussion forums	Chat and messaging Install software Writing macros Programming	Reading Writing Languages English	% 1 <sup>st</sup> language % 2 <sup>nd</sup> language	E-mail quality words/min Letter quality words/min			
Technology	Hardware		Software		Network connection			
	Processor Memory Display size Colors	Disc Audio out Audio in Video in	OS Browser Players Applications	% -	Type Intranet Broadband Dialup Wireless	Up	Down	Cost

GroupOfLearners				Learners		Form copyright © 2005 William Horton Consulting, Inc.				
<b>ID</b>	<b>Project</b> TypeProject: <b>FullProjectTitle</b>	<b>Scope</b> WhereThisFormApplies	<b>Identification</b> XXX-Learners-nn Version n.n – (date)			<b>Owner</b> Copyright © year CopyrightOwner' Address PhoneNumber EMailAddress				
<b>Learners</b>	<b>Description</b> Characteristics of this group of learners. The description should be sufficient for designers to make decisions on behalf of this group. <b>Portion of total audience:</b> nn%	<b>Job function</b> What duties this group of learners performs as part of its job or assignment. <b>Time value:</b> \$nnK per year	<b>Education</b> Educational background of this group of learners: Degree, field, and type of school.	<b>Experience</b> Work experience and other experience common to this group of learners.			<b>Demographics</b> <b>Age range</b> nn - nn <b>Gender mix</b> nn% male <b>Nationality</b> nn% Nationality			
<b>Goals</b>	<b>What do they hope to gain?</b> What the learners hope to get from learning. List specific skills, knowledge, and other advantages. State these from the perspective of the learner.	<b>Why do they take the learning?</b> nn% To accomplish current job nn% Required by boss nn% To qualify for new job nn% To pass certification test	nn% To make more money nn% Curiosity & self-improvement nn% Other				<b>Financial involvement</b> Paid for time learning? YesOrNo Costs they pay themselves: CostsPaidByLearners			
<b>Where</b>	<b>When will they learn?</b> nn% Designated times nn% Normal work hours nn% Evenings nn% Weekends nn% Other	<b>Where will they learn?</b> nn% Private office nn% Cubicle nn% Factory floor nn% Training center nn% Hotel nn% Home nn% Other: TheOther	<b>Geographic distribution</b> nn% All in one building nn% All on one campus nn% All in one city nn% All in one country nn% over nn time zones	<b>Environment</b> <b>Space</b> Description of the space where learning will take place. <b>Lighting</b> Description of lighting where learning will take place. <b>Noise</b> Description of noise and interruptions where learning will take place.						
<b>Abilities</b>	<b>Computer skills</b> E-mail Web browser Word processor Other desktop applications Discussion forums	Chat and messaging Install software Writing macros Programming	<b>Language skills</b> Reading Writing Languages English nn% 1 <sup>st</sup> language nn% 2 <sup>nd</sup> language	<b>Typing</b> E-mail nn words/min Letter nn words/min	<b>Disabilities</b> Physical and mental disabilities common among this group of learners. Examples may include less than perfect vision, hearing, or eye-hand coordination.					
<b>Technology</b>	<b>Hardware</b> <b>Processor</b> XX n.n GHz <b>Memory</b> nn GB <b>Display size</b> nnn x nnn <b>Colors</b> NumberColors	<b>Disc</b> CD-ROM nnX <b>Audio out</b> AudioSpecs <b>Audio in</b> AudioSpecs <b>Video in</b> VideoSpecs	<b>Software</b> <b>OS</b> OperatingSystem <b>Browser</b> BrowserName <b>Players</b> MediaPlayers <b>Applications</b> ProgramNames	<b>Network connection</b> % nn% Intranet nn% Broadband nn% Dialup nn% Wireless	<b>Up</b>	<b>Down</b>	<b>Cost</b>			

Gantt chart readers				Learners		Form copyright © 2005 William Horton Consulting, Inc.				
<b>ID</b>	<b>Project</b>		<b>Scope</b>	<b>Identification</b>			<b>Owner</b>			
	Course: <b>Reading Gantt Charts</b>		Entire course	RGC-Consumers-01 Version 1.1 – (2003.5.1)			Copyright © 2003 William Horton Consulting, Inc. 838 Spruce Street, Boulder, CO, 80203 +1.303.545.6964 william@horton.com			
<b>Learners</b>	<b>Description</b>		<b>Job function</b>		<b>Education</b>	<b>Experience</b>		<b>Demographics</b>		
	Middle and upper managers who need to read and interpret Gantt charts. Typically supervise those who actually construct the Gantt charts.		General management duties, including management of complex projects		Business degree and training in corporate policies but no specific training in reading and constructing Gantt charts.	85% have seen Gantt charts, understand that they show project schedules, and perhaps recognize task bars.		<b>Age range</b>	30-65	
			<b>Time value:</b> \$100K per year					<b>Gender mix</b>	60% male	
								<b>Nationality</b>	65% US & Canada	
<b>Goals</b>	<b>What do they hope to gain?</b>		<b>Why do they take the learning?</b>					<b>Financial involvement</b>		
	Learn to interpret Gantt charts, especially how to use them to make better decisions regarding the scheduling and supervision of complex projects		65% To accomplish current job Required by boss	15% To make more money Curiosity & self-improvement Other	Paid for time learning? Yes Costs they pay themselves: (none)					
<b>Where</b>	<b>When will they learn?</b>		<b>Where will they learn?</b>		<b>Geographic distribution</b>		<b>Environment</b>			
	85% Designated times 5% Evenings 10% Weekends Other		60% Private office 30% Cubicle Factory floor Training center	5% Hotel 15% Home Other:	All in one building All on one campus All in one city 60% All in one country 40% over 24 time zones	<b>Space:</b> No room for more than one piece of paper beside the computer <b>Lighting:</b> OK <b>Noise:</b> Normal office noise with frequent interruptions (every 10 minutes or so)				
<b>Abilities</b>	<b>Computer skills</b>			<b>Language skills</b>		<b>Typing</b>		<b>Disabilities</b>		
	X E-mail X Web browser X Word processor X Other desktop applications		Chat and messaging Install software Writing macros Programming	Reading 10 <sup>th</sup> Grade level Writing 10 <sup>th</sup> Grade level Languages English 60% 1 <sup>st</sup> language 40% 2 <sup>nd</sup> language	E-mail quality 15 words/min Letter quality 10 words/min	None beyond those implied by the demographics of learners. Note: This course is not required to comply with Section 508 or W3C WAG				
<b>Technology</b>	<b>Hardware</b>			<b>Software</b>			<b>Network connection</b>			
	Processor P2 100+ MHz	Disc CD-ROM 4X	OS Windows 98	% 60%	Type Intranet	Up 1 M	Down 1M	Cost -		
	Memory 24 MB	Audio out 16-bit	Browser IE 4+, NS 4+	20%	Broadband	.2 M	1M	-		
	Display size 800 x 600	Audio in (none)	Players Flash 4	20%	Dialup	.02 M	.02 M	-		
	Colors Thousands	Video in (none)	Applications MS Project	-	Wireless					

# LEARNING OBJECTIVES

Reading Gantt Charts - Example		Learning objectives			Form copyright © 2005 William Horton Consulting, Inc.																																																																									
ID	Project	Scope	Identification	Page	Owner																																																																									
Course: Reading Gantt Charts		Entire course	RGC-Objectives-011 Version 1.1 – (2003.5.1)	1 of 1	Copyright © 2003 William Horton Consulting, Inc. 338 Spruce Street, Boulder, CO, 80303 +1 303.545.6964 william@horton.com																																																																									
Meta	<b>Overall objective</b> Shorten projects by applying data available in Gantt charts		<b>Learners</b> Mid-level managers with project-management responsibilities.	<b>Prerequisites for all objectives</b> Project management experience and familiarity with the terms and conventions of project management.																																																																										
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## Instructions

The Learning objectives form is a hierarchical list of learning objectives that the learning product must accomplish. Objectives that are indented beneath a parent objective are prerequisites of that parent objective.

In the **Other prerequisites** column list the ID of other objectives that are prerequisites for the objective.

Express objectives in terms of the performance the objective enables the learner to accomplish. Omit generic phrases such as "Upon completion the learner will be able to" as these are implied.

**AutoText** whcObjectives, whcObjectivesBlank

- Use to**
- List all the learning objectives this project must accomplish.
  - Show prerequisite relationships among learning objects.

**Fill in when** At the beginning of the project after completing the Project and Learner forms. For simple projects, you will need one form per project. For a complex project, you may want to fill in separate Learning objectives forms for each lesson, especially if the lessons will be reused in multiple projects.

**Revise when** The scope or goals of the project change.

**Distribute to** Managers, supervisors, team leaders, and designers on a project.

**Related forms** **Organization** forms shows how the learning objectives will be structured.

**Learning objects** forms fully specify how you will accomplish each learning objective.

**Note** Do **not** use indentation to show the organization of the course. Use an Organization form for that purpose. Use indentation here to show prerequisite relationships among learning objectives.

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<b>UnitOfTheProject</b>			<b>Learning objectives</b>	Form copyright © 2005 William Horton Consulting, Inc.																																																																								
<b>ID</b>	<b>Project</b> TypeProject: <b>FullProjectTitle</b>	<b>Scope</b> WhereThisFormApplies	<b>Identification</b> XXX-Objectives-nn Version n.n – (date)	<b>Owner</b> Copyright © year CopyrightOwner' Address PhoneNumber EMailAddress																																																																								
<b>Meta</b>	<b>Overall objective</b> The top level objective for the whole course or project, phrased as something the learner will be able to do after completing the course.	<b>Learners</b> Short description of the learners for the course or project.	<b>Prerequisites for all objectives</b> Overall prerequisites assumed for everyone beginning the course.																																																																									
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Reading Gantt Charts			Learning objectives	Form copyright © 2005 William Horton Consulting, Inc.
<b>ID</b>	<b>Project</b> Course: <b>Reading Gantt Charts</b>	<b>Scope</b> Entire course	<b>Identification</b> RGC-Objectives-011 Version 1.1 – (2003.5.1)	<b>Owner</b> Copyright © 2003 William Horton Consulting, Inc. 838 Spruce Street, Boulder, CO, 80203 +1.303.545.6964 william@horton.com
<b>Meta</b>	<b>Overall objective</b> Shorten projects by applying data available in Gantt charts	<b>Learners</b> Mid-level managers with project-management responsibilities.	<b>Prerequisites for all objectives</b> Project management experience and familiarity with the terms and conventions of project management.	
<b>Objectives</b>	<b>Objectives</b>			
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	00	Read and interpret Gantt charts.		
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	02	Believe Gantt charts offer benefits to them.	01	
	03	Appreciate that Gantt charts are well established.	01	
	04	Recognize Henry Gantt as the originator of Gantt charts.	01	
	05	Interpret symbols in Gantt charts.		
	06	Name and locate the parts of a Gantt chart	01	
	07	Interpret the grid background of Gantt charts.	06	
	08	Interpret task bars.	06	
	09	Interpret float lines.	06	
	10	Interpret dependency markers.	06	
	11	Interpret milestone markers.	06	
	12	Interpret summary-task symbols [eliminated]	06	
	13	Recognize dependencies that can appear in a Gantt chart.	01	
	14	Interpret start and finish dependencies.	10	
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	19	Consolidate knowledge for more sophisticated interpretations.	06, 13, 18	
	20	Interpret requirements implied in a Gantt chart.	06, 13, 18	
21	Estimate consequences to changes to a project plan.	06, 13, 18		
22	Recognize places where project schedules can be improved	06, 13, 18, 21		
23	Recognize software used to create Gantt charts.	01		

# ORGANIZATION

Reading Gantt Charts - Example		Organization		
	Project	Scope	Identification	Page
	Course: Reading Gantt Charts	Overall course	RHC-Organization-01 Version 1.1 – (2003.5.1)	1 of 1
	<b>Goal</b>  Teach how to shorten projects to mid-level managers who have basic project management skills.			Copyright © 2003 William Horton Consulting, Inc. 103 Spruce Street, Boulder, CO, 80303 • 303.541.6964 www.whc.com
<b>Resources</b>	<b>Common modules</b> Introduction Overview topic Recap topic Content topic <b>Links not shown</b> X Home X Top Welcome X Menu X Help, instructions X Glossary X Summary Test	<b>Diagram</b> <pre> graph LR     Start([Start]) --&gt; Parts[Parts of a Gantt chart]     Parts --&gt; Creating[Creating Gantt charts]     Creating --&gt; Dependency[Dependency types]     Dependency --&gt; CriticalPath[Critical path]     Dependency --&gt; Relationships[Relationships in view]     CriticalPath --&gt; Prerequisites2[Prerequisites]     Prerequisites2 --&gt; ManagingChange[Managing change]     ManagingChange --&gt; OpenMinded[Open-Minded Improvement]     OpenMinded --&gt; Reporting[Reporting]     Reporting --&gt; ManagingConstraints[Managing constraints]     ManagingConstraints --&gt; Practice[Practice]     </pre>		

## Instructions

The Organization form helps designers plan the organization of learning objects for a complete course, a lesson, a simulation, or any other unit of learning comprised of multiple, interrelated parts with navigational pathways among them.

The placeholder graphic is an embedded PowerPoint slide. To edit it, simply double-click the graphic and use the drawing tools just like you would use them in PowerPoint. To get out of the edit mode, just click in some other part of the form.

If each learning object represented in the diagram has common elements, like an introduction, summary, etc., then list the common modules in the area of the form called "Common modules."

**AutoText** whcOrganization, whcOrganizationBlank

**Use to** Visually describe the:

- Structure of a course, lesson, or complex learning object.
- Navigation possible among components of a course or lesson.
- Pathways through the scenes of a branching simulation.

**Fill in when** Prior to beginning development of individual learning objects or other components depicted in the form.

Fill in one form for the overall course. If the course is complex, you may use additional forms for lessons or other parts of the course.

**Revise when** Testing or user feedback indicates the organization can be improved.

**Distribute to** All members of the project team, especially the designers of individual objects so that they can see how their work fits into the whole and can put in appropriate links.

**Related forms** **Learning objectives** form lists all the learning objectives for the course and their prerequisite relationships.

**Learning object** form may specify more detail about each object shown in the organization.

**Simulation scene** form may specify the details of individual scenes shown in the organization.

		Organization			Form copyright © 2005 William Horton Consulting, Inc.
ID	Project	Scope	Identification	Owner	
Resources	Goal	Diagram			
	Common modules				
	Links not shown				
	Home Top Welcome Menu Help, instructions Glossary Summary Test				

*Preview version only*

UnitOfTheProject		Organization		Form copyright © 2005 William Horton Consulting, Inc.
ID	Project	Scope	Identification	Owner
	TypeProject: <b>FullProjectTitle</b>	WhereThisFormApplies	XXX-Organization-nn Version n.n – (date)	Copyright © year CopyrightOwner' Address PhoneNumber EMailAddress
<b>Resources</b>	<b>Goal</b> Brief restatement of the goal of this unit of the project.	<b>Diagram</b> <pre> graph LR     A[Name of sequence] --- B1[High-level module]     A --- B2[High-level module]     A --- B3[High-level module]     A --- B4[High-level module]     A --- B5[High-level module]     A --- B6[High-level module]     B1 --- C1[Mid-level module]     B1 --- C2[Mid-level module]     B2 --- C3[Mid-level module]     B2 --- C4[Mid-level module]     B3 --- C5[Mid-level module]     B3 --- C6[Mid-level module]     B4 --- C7[Mid-level module]     B4 --- C8[Mid-level module]     B5 --- C9[Mid-level module]     B5 --- C10[Mid-level module]     B6 --- C11[Mid-level module]     B6 --- C12[Mid-level module]     C1 --- D1[Low-level module]     C1 --- D2[Low-level module]     C2 --- D3[Low-level module]     C2 --- D4[Low-level module]     C3 --- D5[Low-level module]     C3 --- D6[Low-level module]     C4 --- D7[Low-level module]     C5 --- D8[Low-level module]     C6 --- D9[Low-level module]     C7 --- D10[Low-level module]     C8 --- D11[Low-level module]     C9 --- D12[Low-level module]     C10 --- D13[Low-level module]     C11 --- D14[Low-level module]     C12 --- D15[Low-level module]   </pre>		
	<b>Common modules</b>			
	ModuleName			
	<b>Links not shown</b>			
	<input checked="" type="checkbox"/> Home <input checked="" type="checkbox"/> Top <input checked="" type="checkbox"/> Welcome <input checked="" type="checkbox"/> Menu <input checked="" type="checkbox"/> Help, instructions <input checked="" type="checkbox"/> Glossary <input checked="" type="checkbox"/> Summary <input checked="" type="checkbox"/> Test			

Reading Gantt Charts		Organization		Form copyright © 2005 William Horton Consulting, Inc.
ID	Project	Scope	Identification	Owner
	<p>Course: <b>Reading Gantt Charts</b></p>	Overall course	RGC-Organization-01 Version 1.1 – (2003.5.1)	Copyright © 2003 William Horton Consulting, Inc. 838 Spruce Street, Boulder, CO, 80203 +1.303.545.6964 william@horton.com
<p><b>Goal</b> Teach how to shorten projects to mid-level managers who have basic project management skills.</p> <p><b>Common modules</b> Introduction Overview topic Recap topic Content topic</p> <p><b>Links not shown</b></p> <ul style="list-style-type: none"> <li>X Home</li> <li>X Top</li> <li>Welcome</li> <li>X Menu</li> <li>X Help, instructions</li> <li>X Glossary</li> <li>X Summary</li> <li>Test</li> </ul>	<p><b>Diagram</b></p> <pre> graph TD     UGC[Using Gantt Charts] --- Start[Start]     UGC --- PG[Parts of a Gantt chart]     UGC --- CG[Creating Gantt charts]     UGC --- DT[Dependency types]     UGC --- CP[Critical path]     UGC --- RWI[Real-world issues]     UGC --- FP[Final practice]      Start --- Welcome[Welcome]     Start --- Definition[Definition]     Start --- Benefits[Benefits]     Start --- BigPicture[Big picture]      PG --- Framework[Framework]     PG --- TaskBars[Task bars]     PG --- DL[Dependency links]     PG --- FL[Float lines]     PG --- M[ Milestones]     PG --- P1[Practice]     PG --- P2[Practice]      DT --- SF[Start and finish]     DT --- LS[Lagging starts]     DT --- PD[Partial dependency]     DT --- P3[Practice]      RWI --- MC[Managing change]     RWI --- SI[Spotting improvements]     RWI --- R[Reporting]     RWI --- MC2[Managing constraints]   </pre>			