



Content Creation Guidelines

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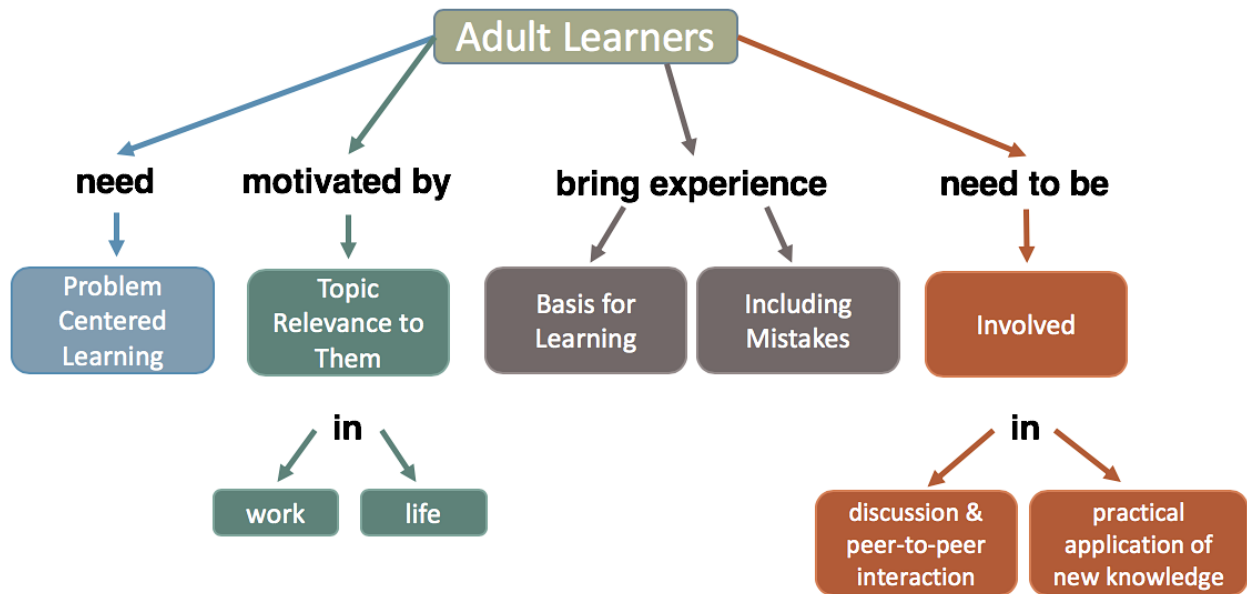
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Content Creation Guidelines

Overview

This guide is meant to explain the way OCI Knowledge Services approaches content creation. This is an effort to be transparent and foster a larger discussion with the campus about standards and methods for materials produced to provide a common and consistent delivery schema for those consuming the content.

Studies have shown that adult learners are more likely to retain educational content by being actively engaged in their learning through discussion, feedback, and activities¹.



Training Development Guidelines

Self-learning and Beliefs

Every adult learner has some belief about how they learn. These beliefs have been developed through life experiences that have impacted them throughout their years. These perceptions are based in both positive and negative events. Moreover, these beliefs may not be entirely accurate and can either enhance or interfere with their ability to learn. Remember that the idea of a new training program may sometimes raise insecurities in your adult learner.

Relevance and What’s in it for Me? (WIIFM)

Adult learners need to buy into the need for the training. This is key as participants may tune out and mentally shut down if the training is not directly relevant to their life and work. They must know the “what’s in it for me” (WIIFM). Consider what makes the training necessary and meaningful? This should be addressed upfront, at the beginning of your training. If your adult learners don’t get the WIIFM quickly they will likely disconnect from the training.

Previous Experience and New Learning

It is important for your adult learners to draw connections between the new training and their previous knowledge and skills. When they can make these connections, they are then more likely to implement the new concepts, information or skills being taught.

Solutions Driven and Problem-Centered

While the content of the training is important, adult learners are more likely looking for solutions to a problem. The experience must be more than listening to someone lecture on a topic. A solutions-oriented training can help retain new information. If the training is not relevant or if it does not help to resolve their issues, they will lose interest.

Active Learning and Participation

Active participation, discussion, feedback, and peer-to-peer activity adds tremendous value to adult training. Adults need to be connected to the training and each other as passivity breeds disconnection. A passive participant should be engaged or enticed into playing a more active role in the training session. The creation of a responsive and supportive training environment will create a positive atmosphere for the learner and garner positive training results.

Engagement and Emotional Connections

As a trainer you should seek to empower and engage your participants. Striking a positive emotional chord with your learners is important. When learning is connected to emotion, it is more likely to be remembered. Moreover, adult learners want to make a positive contribution to their learning.

Understanding the Audience



Learning Objectives

Why are objectives important?

1. Learning objectives are brief measurable statements that describe what the training participant is expected to learn from the training.
2. The learning objectives **MUST** provide a detailed description of what the training participant will be able to do when the training has ended.

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3. Learning objectives should be used as a learning directive to help training participants make practical use of the information.
4. Learning objectives should be measurable; the training participant should be able to evaluate the session as to the extent in which the learning objective(s) were achieved.

How to write an objective

Create a separate objective for each action. "At the end of this (class, lesson, workshop, etc.) you will be able to ..." Each outcome should be measurable, actionable, or observable. Use words like describe, identify, or summarize, as some verbs are difficult to quantify as measurable for an outcome (ex: become familiar with). See Bloom's Taxonomy at the end of this document.

Content Creation

Dependent on the subject, different material creation will be needed. In OCI Knowledge Services the most common materials created are:

- **Training Guides** – a comprehensive, detailed guide of the entire process being documented.
- **Job Aids** – a job aid is one process, generally a step-by-step instruction guide.
- **PowerPoint** – used for a live training session, a PowerPoint would be slides covering the important ideas of the material, with the trainer using their knowledge of the subject to speak to the ideas presented.
- **Canvas** – currently the learning management system (LMS) used at UTA. Canvas can be used for synchronous or asynchronous learning.
- **Videos** – short, instructional videos for a single process, basically a visual job aid.
- **Knowledge Base Articles** – short, instructional articles posted to the ServiceNow knowledge base. OCI Knowledge Services partners with Campus Subject Matter Experts (SMEs) to create and publish informative articles for campus consumption.
- **Training Exercises** – these are short, hands-on classroom techniques built to reinforce the learning objectives and practiced with the training participants.

Asynchronous learning is an instruction that can be completed on the participants own time, outside of the standard training environment.

Synchronous learning is a more traditional way of delivering training content, with a live instructor to participants at the same time.

Standards for Content Creation

OCI Knowledge Services utilizes the below content creation standards in the effort to create materials that are consistent in aesthetic, easy to use and understand, and provide relevant yet succinct information for the learner. While it is understood that materials will vary due to the nature of the document creation process and the intricacies of the training topics, using these standards helps to ensure that there remains a systematic approach to content creation.

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Templates for Training Material

OCI Knowledge Services has templates for Training Guides, Job Aids, Training PowerPoint Presentations, and Service Now Knowledge Base Articles. These templates provide the framework for new documentation and revision of current materials.

New Document Review

New and revised materials go through peer, OCI Managerial, and functional department review prior to being published. This review process seeks to identify inconsistencies in document formatting, ensure appropriate and completed instruction is included, and that the content meets the desired purpose.

Data Masking

OCI Knowledge Services takes care to sanitize training materials of sensitive employee and student information. Such masking consists of either blurring or over-writing the sensitive data on screen captures included in training materials.

Accessibility Considerations

All documents need to go through the application's Accessibility Checker. For both Word and PowerPoint, this can be found in the Review ribbon, shown as "Check Accessibility".

Per [SiteImprove](#), for font colors that meet the specific Web Content Accessibility Guidelines (WCAG) contrast ratios. Use the free [Colour Contrast Analyzer](#) to determine the ratio of your font colors.

- Headings: Contrast ratio for large-scale text should be a minimum of 3:1.
- Main Text: For text other than headings, a contrast ratio of at least 4.5:1 should be maintained.
- Logotype: Text which is a part of a logo or brand has no contrast requirement.
- Incidental Text: Text which is part of an inactive user interface, pure decoration, invisible, or part of a picture, and does not convey meaningful information, has no contrast requirement.

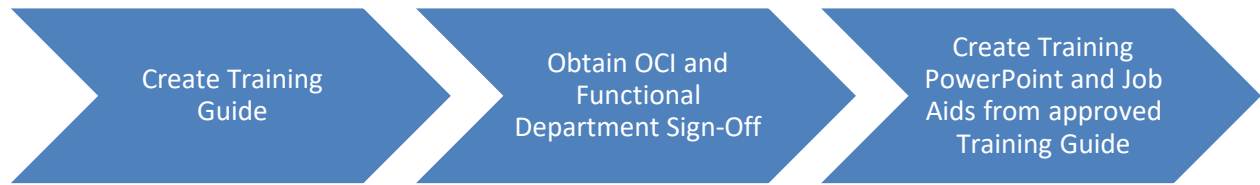
Use the Microsoft Styles to format document section headings. This will create a table of contents but will also create a document map. Access the Document Map by enabling the Navigation Pane (in the View ribbon, click the Navigation Pane checkbox) and reviewing the Headings section. Review this document map to ensure headings have been formatted appropriately (do all headings show?) and that there aren't gaps in the document map (gaps indicate blank lines have had a style

Document Creation Best Practices

OCI Knowledge Services has devised certain best practices that help to standardize the formatting of training documents. Below are listed the stated specifications per document type:

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Document Creation Flow



Training Guides

Training guides should be created for an entire topic. They should include not only the steps for performing actions related to the topic, but additional information and details regarding the business processes and data involved with the topic. This document should be created initially and approved by OCI Knowledge Services and the relevant Functional Department (i.e. Payroll, Procurement, etc.) and is to serve as the source from which the language for the other training materials is extracted. Training Guides should be posted to the OCI Knowledge Services Training & Development as PDF documents.

Standards for OCI Knowledge Services Training Guides:

- Use the OCI Knowledge Services Training Guide template.
- Use Microsoft Styles throughout the document for accessibility and the creation of a responsive Table of Contents.
- Use font **Calibri**, size **11** for “normal” style.
- Present information, details, and narrative about the topic or step prior to presenting the instructional steps.
- Organize instructional steps in numbered lists. Use Word’s numbering function.
- Format instruction notes with the word “note” capitalized and bolded, and italicize the text of the note (i.e., **Note**: *Only used for certain departments.*).
- Maintain **6 pt. spacing** after items within bulleted and numbered lists.
- Maintain **12 pt. spacing** before and after inline-text images.
- Provide pathways to screens/pages in a format that uses bolded text and the right-pointing bracket (>) in between the steps (i.e., **UTA.edu > Faculty & Staff > UTA Apps button**).
- Add borders to images in the Word document, when possible, to allow for cropping of image in document (Format Picture > Fill & Line > Solid Line).
- Size images so that the text on the image is as close to the size of the text in the document as possible.
- Mark documents through SnagIt to point-out and or highlight relevant areas or selections on the screen capture, then adding the marked-up image into the document (aka do not create/mark-up documents in Word).
- Review all screen captures for sensitive data that may need to be blurred or over-written. Perform such data sanitation in SnagIt prior to pasting image into document.

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- Use generic employee and student names when possible (i.e., Sam Maverick, Blaze Nedderman, etc.).
- Use generic numbers when possible (i.e., 1234567890 for things such as Department, Cost Centers, ID numbers, etc.).
- Never include in a training document an employee's name and salary.
- Include in the header of the document the OCI Knowledge Services logo to the left and the Document title to the right.
- Include in the footer of the document the "Date Updated" to the left and the page number to the right.
- Use Department names instead of employee names, and Department or Group email and phone numbers instead of employee-specific email or phone numbers (i.e., Travel Services at TravelServices@uta.edu).

Job Aids

Job aids are used to provide the steps for one particular action. Only the details for the specific process should be included, and thus, Job Aids will be shorter in length than a Training Guide. As the details regarding the action should be included in the associated Training Guide, Job Aids should include a hyperlinked reference to said Training Guide.

Job Aids should be created by extracting the pertinent information and steps from the approved Training Guide. The language used in both documents should be identical. As such, the Standards used to create the Training Guides also apply to Job Aids.

Job Aids should be posted to the OCI Knowledge Services Training & Development as PDF documents.

Training PowerPoint Presentations

Training presentations are used for communicating information to end-users during in-person training sessions.

Standards for OCI Knowledge Services PowerPoint presentations:

- Use the OCI Knowledge Services PowerPoint presentation template.
- For the presentation agenda, use category descriptions, not each slide step.
- Abide by the 5/5/5 rule: No more than 5 bullets per slide, No more than 5 words per bullet, No more than 5 word-heavy slides in a row.
- Use colors, formats, images, for data comparisons.
- Include relevant UTA Policies and Procedures
- For resource information, use Department names instead of employee names, and Department or Group email and phone numbers instead of employee-specific email or phone numbers (i.e., Travel Services at TravelServices@uta.edu).
- Post important notes and points to be covered verbally during the presentation in the Notes section of the slide.
- Publish PowerPoint presentations as PDF documents.

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Canvas Courses

- Use KS first page

Videos

- To record your screen, use Snagit.
 - Use “Region” then click and drag to make a rectangle on your screen. As you drag, Snagit will create a 16:9 rectangle that you can use. This is ideal as 16:9 is the screen ratio you want for all your videos.
 - If your browser window doesn’t fit in the 16:9 rectangle, you can resize after you start recording.
 - My preference is to NOT capture the cursor. I would rather add a cursor in Adobe Premiere Pro than have my cursor wandering all over the screen.
 - When capturing a process in Snagit linger on a page or section longer than you might normally. This can be trimmed down in editing. You can always extend any section in editing too, but I prefer to trim rather than extend whenever possible.
 - It is your preference if you want to record your microphone at this time. The final voiceover (VO) should be added in Premiere. Any VO captured now would be a guide as you capture the process.
- Once you have the raw, unedited footage needed, save it out of Snagit then open Premiere Pro or Premiere Rush (a simpler video editor).
- Begin with the KS Video Intro
- Add in the raw footage captured above
- The video should contain a title card indicating the title (purpose) of the video
- Finalize your script and record the “final” voiceover in Premiere
- Edit the video to fit the VO
- The overall look and feel of KS videos should be simple, clean, and quick but not fast
 - Trim any page load or system processing time out of the video whenever possible. Try to maintain a flow and energy to prevent lulls that may cause a viewer to disengage.
- Once the video is “locked” for time you can begin covering personal data or adding arrows and other notations
 - Attempt to match the look and feel of the text as best as possible
 - When selecting colors for arrows, keep accessibility top of mind
- Add music, if desired.
 - Try to find music, I have always used music in Premiere Pro, that fits the tone of the video. Avoid slow or overly specific music. Meaning, probably not a very country sounding or hip-hop sound. Something upbeat and “corporate” seems to be the right vibe for these types of videos.

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- Music should be low in volume. The VO is most important and should be featured. The music's primary purpose is to cover any background noise in the VO. Consider something around -20dB for music level.
- Export the video out of Premiere
 - Format: H.264 is the export format I've used
 - If you used music from Premiere, you may get a warning that the music is not high quality. You can ignore this as the music is low enough in volume that the quality does not affect it.
- Upload the exported video to YouTube (UTA OCI Knowledge Services Channel)
- Use YouTube to generate captions
- Use the Photoshop Thumbnail template to create a thumbnail image
 - Export the image and add to the video details on YouTube
- Set the YouTube video to be hidden. Then, you can use the embed code or the URL to share the video as needed. In KBs, Canvas classes, send the link via email, etc.

Knowledge Base Articles

Training Exercises

Training Exercises are used for in-person class exercises. They should be performed in a lower environment to preserve the integrity of the Production environment. This may require that you work with an ISA member to ensure the class registrants are able to access the lower environment. Working with lower environments also means that there may be date considerations requiring adjustments to the exercises (refresh dates, open accounting periods, TCP locked periods, etc.) before class.

Standards for Training Exercise documents:

- Use the Training Exercise template.
- Include specifics such as cost centers, projects, or employee ID's as an example (ex. 123456) so that participants can use their own, but will have a valid one to use if they do not know their own.
-

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Taxonomy for Outcomes (Bloom's)

Definitions	I. Remembering	II. Understanding	III. Applying	IV. Analyzing	V. Evaluating	VI. Creating
Bloom's Definition	Exhibit memory of previously learned material by recalling facts, terms, basic concepts, and answers.	Demonstrate understanding of facts and ideas by organizing, comparing, translating, interpreting, giving descriptions, and stating main ideas.	Solve problems to new situations by applying acquired knowledge, facts, techniques and rules in a different way.	Examine and break information into parts by identifying motives or causes. Make inferences and find evidence to support generalizations	Present and defend opinions by making judgments about information, validity of ideas or quality of work based on a set of criteria.	Compile information together in a different way by combining elements in a new pattern or proposing alternative solutions.
Verbs*	<ul style="list-style-type: none"> • Arrange • Choose • Define • Describe • Duplicate • Find • Identify • Label • List • Match • Name • Order • Outline • Recognize • Recall • Relate • Select • Show • State • Tell 	<ul style="list-style-type: none"> • Classify • Compare • Contrast • Demonstrate • Describe • Discuss • Explain • Extend • Identify • Illustrate • Infer • Interpret • Outline • Paraphrase • Recognize • Relate • Rephrase • Show • Summarize • Translate 	<ul style="list-style-type: none"> • Apply • Build • Choose • Construct • Demonstrate • Develop • Experiment with • Identify • Illustrate • Interpret • Make use of • Model • Organize • Plan • Select • Solve • Utilize 	<ul style="list-style-type: none"> • Analyze • Apply • Categorize • Classify • Compare • Contrast • Discover • Dissect • Distinguish • Divide • Examine • Inspect • List • Motive • Relate • Solve • Survey 	<ul style="list-style-type: none"> • Appraise • Assess • Choose • Compare • Conclude • Contrast • Describe • Deduct • Estimate • Evaluate • Explain • Interpret • Judge • Justify • Measure • Opinion • Perceive • Prioritize • Relate • Summarize • Select • Support 	<ul style="list-style-type: none"> • Arrange • Build • Categorize • Collect • Combine • Compile • Compose • Construct • Create • Design • Develop • Devise • Explain • Formulate • Generate • Imagine • Improve • Invent • Modify • Plan • Predict • Prepare • Relate • Revise • Summarize

Anderson, L. W., & Krathwohl, D. R. (2001). A taxonomy for learning, teaching, and assessing, Abridged Edition. Boston, MA: Allyn and Bacon. * **Verbs to avoid: Understand | Appreciate | Know | Familiar with | Learn about | Become aware of**

¹https://www.ncjrs.gov/ovc_archives/educator/files/chapter3.pdf