

# The Standards Document for e-Learning Courses

The question came up on an email discussion list about the contents of a standards document for e-Learning and what parts of that should come from the client.

## Introduction

In e-Learning, the standards document is an output after several other stages of design and development. The following diagram shows where the development and writing of a standards document typically falls in the process.

As shown, the standards document summarizes all the efforts and decisions that have been made up to date. The document can be a separate document or sections appended to the design document.

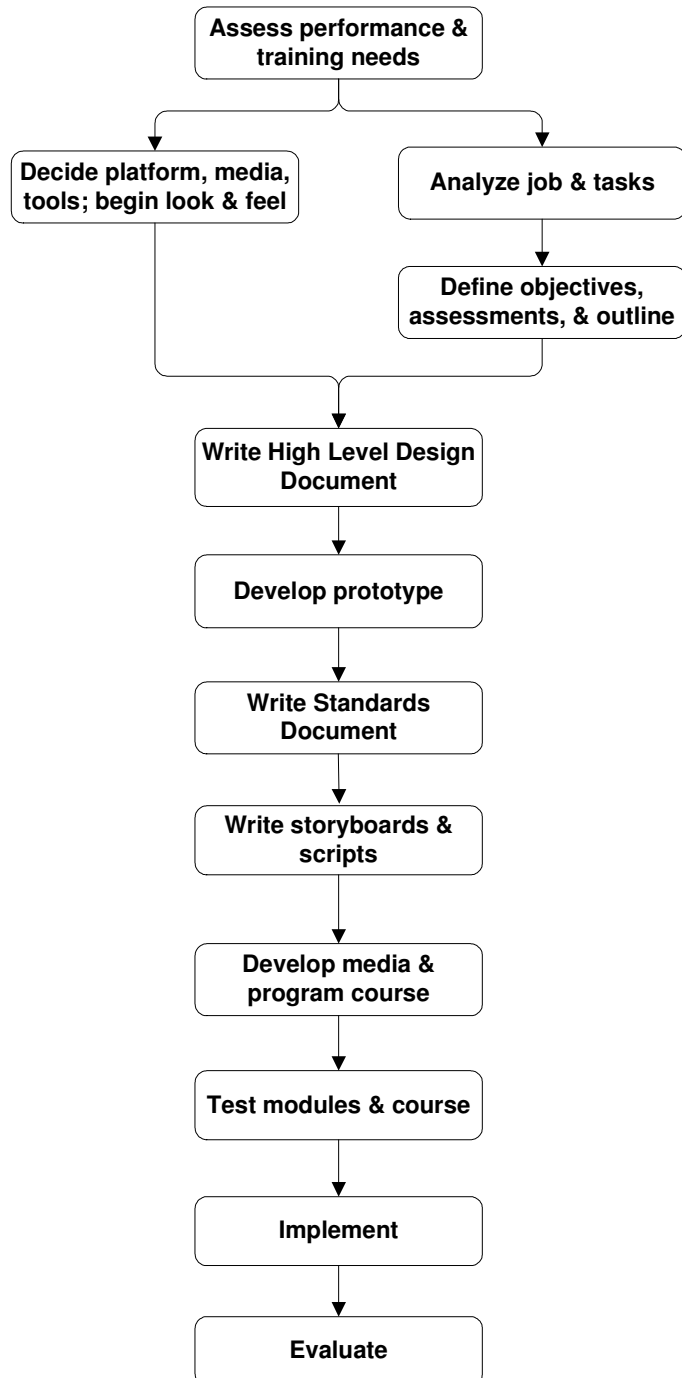
## The Design Document: A Precursor

Generally, the design document precedes and sets the stage for the details of the standards document. So let's talk a minute about what is contained in the design document.

The design document specifies agreements made during and as a result of the task analysis and includes all objectives and assessments as part of a full course outline. The design document also specifies information known about the infrastructure and platform for the course, media that can be used on that platform, and the tools that will be used to develop the course. Screen templates/layouts can also be included but may be modified and will be more fully documented in the standards document.

Typical contents of the design document include but are not limited to:

- Purpose of the course
- Audience description



- Course learning objectives
- Final course assessment decisions/needs
- System requirements
- Instructional architecture and media types that will be used\
- Estimated seat time of course
- High level outline including units and lessons
- Course structure diagram/flowchart
- Course structure description from the user standpoint
- Media
- Tools
- Talent needed (voice over and actors)
- Navigation and course operations
- Detailed outlines by unit, including objectives, practice exercise types and content, and instructional methods
- Ownership and maintenance
- Estimated development time based on current knowledge
- Support requirements from SMEs and client
- Project sign-off

### **The Prototype**

As you look at our process flow, typically we develop a prototype after the basic decisions have been made and prior to writing the standards document and beginning full course development. The prototype is a fully developed 10 – 15 minute piece of content that represents some of the more complex content pieces and interactions as well as all screen layout types and navigation. The internal or external client typically reviews the prototype thoroughly for:

- Does the course work on the intended end-user’s platform? Does it load and play well with no delays or unintended breaks in delivery?
- Screen layouts – do they work?
- Colors – how are they when used with content (even though colors and layouts will have been shown and reviewed in the look and feel stage)?
- Navigation – do they work properly, are they intuitive, and are appropriate navigation elements used on each screen type?
- Interactions – do they work properly and support learning, are they instructionally sound?

- Media use – is it appropriate, does the use of any media get in the way?
- Are all elements used consistently, both in placement and in functionality? Is there anything that would be confusing to the user?
- Is the language used appropriate for the audience and in keeping with the client's corporate standards?
- If using audio, are the voices audible and appropriate for the audience and content? Do they have the right level of enthusiasm and emphasis?
- If using video, does it play on the infrastructure and end-user's workstation?

At the prototype stage, the complete accuracy of content is not as important as is the functionality of the course, its entire look and feel, and its usability. At this stage, we want all input from the client that we can get, so that we don't end up changing some aspect later that impacts several developed units or lessons. Here the client and team make final decisions about all areas of functionality and look and feel for the course as well as continuing to ensure that the course plays on the specified platform.

### **The Standards Document**

The standards document, as shown by our diagram, comes after the prototype stage and documents all decisions made to that point. It can be a separate document or appended to the design document. The client signs off on the document, and it is then distributed to the development team so that each person who is writing storyboards or developing course elements will write or develop to the same standards. Generally, it includes these elements:

- An introduction
- Screen layouts: specific ones used. Content and elements included on each, and screen captures of each
- Navigation and operations for menus, navigation bar, each screen type, help, search, and other course-wide screens
- Course flowchart (probably the same one as in the design document)
- Guidelines for writing
- Guidelines for art
- Logo use
- Audio use and standards
- Video use and standards
- Interactions (questions and exercises): functionality, types, feedback, and evaluation standards
- Other standards
- Sign-off

## **The Basic Question**

The question that was asked was what should come from the client. Ultimately, all the decisions are made by and with the client, often with heavy input and guidance from the development and design team. Clients help answer all questions of standards that are documented in the Standards Document. A client that has developed several other e-Learning courses may, in fact, come to the project with a lot of their standards pre-determined and documented. Standards for the current course are then made with those other standards in mind. Sometimes the nature of the new course requires modification of existing standards, and other times not. When a client has not developed e-Learning courses before, the design and development team must provide guidance and assistance to the client in developing the standards. Regardless of the experience of the client, all standards and standard functionality must work with the course type, job and tasks to be trained, and the platform on which the course will play. It is in these latter areas that the design team provides input and advice to most clients.

So the answer is a definite ID – It Depends.

## **Templates**

Templates for design and standards documents are available at [www.jemcommunications.com/templates.htm](http://www.jemcommunications.com/templates.htm).