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COMMENTARY INTERFACE TRAINING

Software Training for Commentary Interface Program

DESIGN DOCUMENT

Instructional Designer

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INTRODUCTION

Course Description

A six-week e-learning online course that focuses on teaching employees and clients of Bloomberg LP how to use the company's internal software program, the Commentary Interface program. Students of the course will be taught how to use this software in order to create new screens and/or update existing screens on the Bloomberg system without having to learn the proprietary programming code behind each screen.

Course Goal

The goal of this program is to train students on how to use the Commentary Interface program in order to create, design, and update screens on the Bloomberg system. This training will be done using online video tutorials to provide step-by-step instructions for learning various tasks within the software program. Each student will be assigned their own screen on the Bloomberg system that will be used for practice and to complete quizzes required after week's lesson. Upon completion of the online course, students will be able to create and update screens on the Bloomberg system efficiently and within 100% accuracy.

Course Objectives

Upon completion of this software training program, students will be able to:

- **Create screens for the Bloomberg system.**
- **Learn company standards for creating screens.**
- **Design screens that are both creative and that follow company standards.**
- **Update already existing screens on the Bloomberg system.**
- **Learn proper methods for using the Commentary Interface software to most efficiently create and update one screen or a group of screens at once.**
- **Learn all components of the Commentary Interface software program.**

Entry Behaviors

Students of the course should have a basic knowledge of how to use the Bloomberg system for accessing screens, as well as a basic working knowledge of MS Excel.

AUDIENCE, GOALS AND ENVIRONMENT

Target Audience

Any internal employee or client of Bloomberg LP needing to learn how to create or update screens for the Bloomberg system.

Context Analysis

Instructions for this training will be available through online videos uploaded to the Moodle platform, along with quizzes that will follow each instructional video. Each quiz will be comprised of a series of exercises that students will use their assigned class screen to practice with. The Moodle platform will be used for students to verify that their practice screen and final assignment screen look like the example screen displayed, as well as for students to access the course evaluation form to provide feedback and rate the course's efficiency and effectiveness. The Moodle platform will also include a link for students to submit requests to have the Commentary Interface program installed (if necessary) and submit questions.

Instructional Strategies

Models (types) of Instruction:

- **Direct Instruction** – online video tutorials will allow employees to view and hear demonstration of step-by-step instructions on how to perform specific tasks within the software program.
- **Dick and Carey Design**
 - *Determine what it is you want learner to be able to do*
 - *List of goals*
 - *Step-by-step what people are doing when they perform that goal*
 - *Entry behaviors*
 - *Create a training goal flowchart*

- **Independent Study** – this course will be conducted through instructional video tutorials where students view each lesson and then practice using their assigned practice screen. Students are therefore responsible for their own development of individual initiative.
- **Computer Assisted Instruction (CAI):** Instructions for learning the software program are presented on a computer. Students can go through each lesson at their own pace and work individually, or teams in the company may work together in a group. Computers will also to check class practice screens submitted by students after each lesson plan by having students verify that their screen looks like the example screen displayed.

TRAINING PROGRAM DESIGN

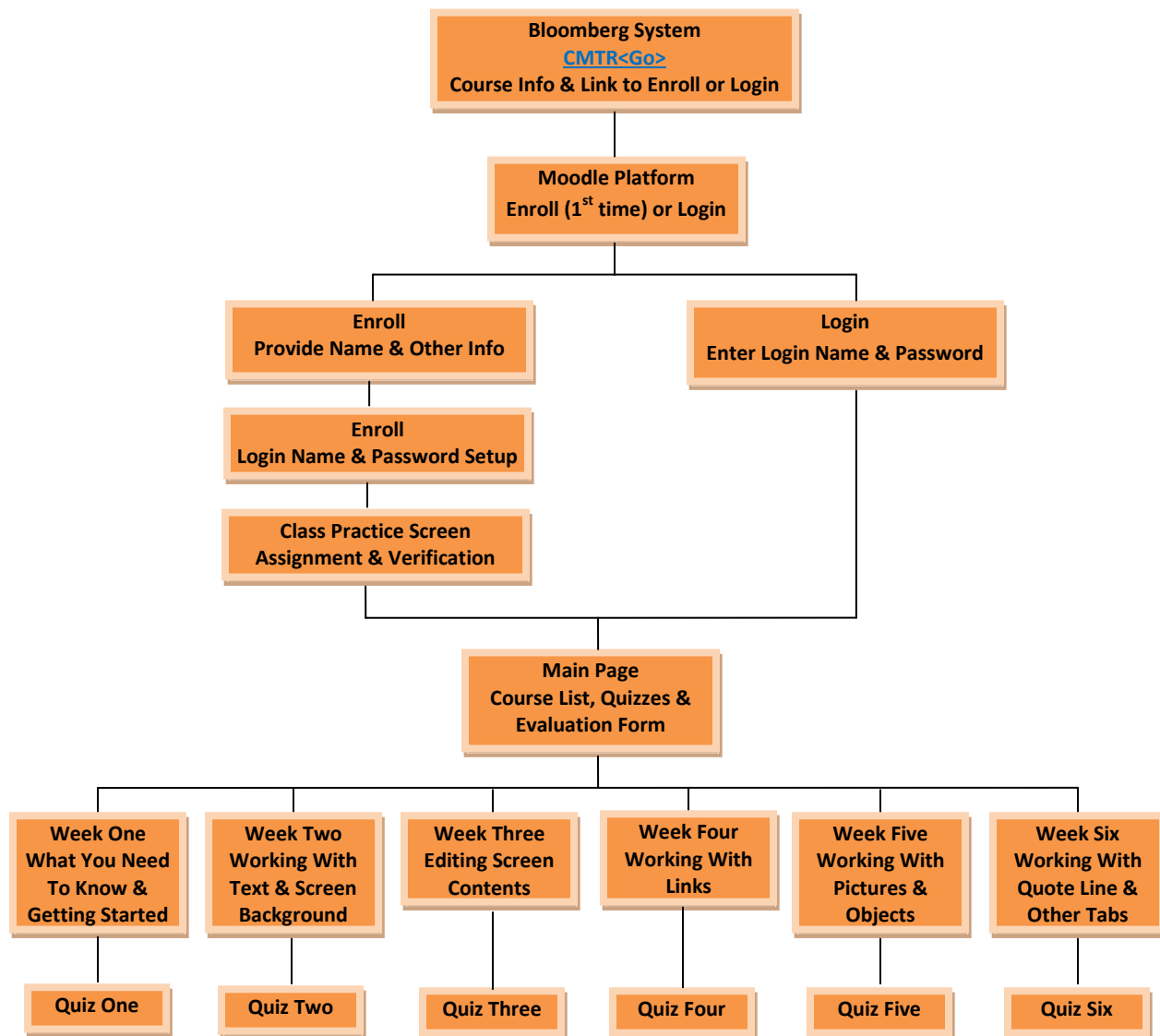
Instructional Material

Instructional material will be created through www.jing.com, where step-by-step instructions for performing specific tasks in the program will be viewed by recording all movements for each step on a computer screen and including voice overlay for specific instruction.

Downloadable training manual (PDF format) – optional.

Training Flowchart (*see next page*)

Training Flowchart



TRAINING SYLLABUS**Week One: What You Need To Know & Getting Started****1) Introduction To the Course**

- Course Materials – download training manual (optional)
- Class Practice Screen assignment

2) Introduction To the Commentary Interface program:

- What is Commentary?
- What is the Commentary Interface program?
- Software applications needed

3) Getting Started With the Commentary Interface:

- Opening the Commentary Interface application
- Getting to know the Commentary Interface

4) The Screens Tab:

- About the Screens Tab
- Creating a new screen
- Opening a new screen
- Uploading a screen
- Saving a screen
- Closing a screen
- Copying a screen
- Renaming a screen
- Viewing Code for a screen
- Brief demo on entering text
- Upload practice screen (with text)

5) Practice Exercise 1 – Uploading practice screen with text, saving screen, closing screen, re-opening screen.

Week 2: Working With Text & Screen Background**1) The Text & Formatting Tab:**

- About the Text & Formatting tab
- Adding and/or importing text
- Adding special characters
- Editing text on screen
- Formatting screen contents

2) The Borders Tab

- About the Borders tab
- Adding borderlines on screen
- Clearing borderlines on screen

3) Practice Exercise 2 – Adding text, formatting screen & adding borderlines.**Week 3: Editing Screen Contents****1) The Right-Click Menu**

- Moving (cutting) or copying & pasting screen contents
- Clearing screen contents
- Aligning text on screen
- Sorting text on screen
- Change font case for text on screen

2) Practice Exercise 3 – Moving, copying/pasting, clearing screen contents; aligning, sorting, & changing font case for text on screen.**Week 4: Working With Links****1) About Links****2) The Links Tab**

- About the Links tab
- Adding links on screen
- Viewing links on screen
- Editing links:
 - Editing link information
 - Editing size of a link's clickable range
 - Editing menu numbers in link codes
 - Moving and/or copying links on screen
 - Moving the start position of a link's clickable range
- Deleting links on screen

3) Practice Exercise 4 – Adding, moving, and clearing links; editing link information, clickable ranges, and start positions for clickable ranges.

Week 5: Working With Pictures & Objects**1) Pictures & Objects Tab:**

- About the Pictures & Objects tab
- Adding images from image functions on screen
 - Adding images from FLAG<Go>
 - Adding images from NCUP LOGO<Go>
 - Adding images from LOGO<Go>
- Maintaining images on screen
- Clearing or deleting images on screen

2) The Picture Management Tab

- About the Picture Management tab
- Importing images from image functions (NCUP LOGO, FOTO)
- Deleting images from Picture Library

3) Practice Exercise 5 – Adding, moving, and clearing images; importing and deleting images in Picture Library

Week 6: Working With the Quote Line & Other Tabs in Commentary Interface**1) Quote Line Tab:**

- About the Quote Line tab
- Adding text in quote line 1 and/or quote line 2
- Editing text on quote lines
- Deleting text on quote lines

2) The Options Tab

- About the Options tab
- Selecting settings for Japanese screens and 22 row screens

3) The Notes Tab

- About the Notes tab
- Using the Notes tab – entering and removing notes in Notes tab.

4) Practice Exercise 6 – Adding text in quote line 1 & 2, removing text from quote line 2; selecting special options, and entering screen notes.

COURSE EVALUATION PLAN

Criterion Reference Test

Following each video lesson there will be practice exercises to complete before students can move on to the next video lesson, to ensure that the information for each lesson has been properly learned. Once all training videos are complete, students are expected to submit their practice screen for evaluation with at least 100% accuracy.

Quiz Questions

Week One: Getting Started

- 1) Create a new screen – name screen after your assigned practice screen.
- 2) On the first row, add your first and last name (in uppercase)
- 3) Upload your screen:

Firm #: 354File Extension: BCM
- 4) Save and close your screen
- 5) Open your screen

Week Two: Working with Text & Screen Background

- 1) On page 1, add the following text at the end of row 5:

Page 1 of 2
- 2) Copy the text from CMTR PE1<Go> and paste on your screen starting at row 11, col 3
- 3) Add a checkmark at row 11, col 1
- 4) Edit the text on row 1 – change it from your first and last name, to:

Your name'S SCREEN
- 5) Surround rows 1-4 with a pink borderline
- 6) Surround rows 6-23 with a light blue borderline

- 7) Copy page 1 (name new page: page 2)
- 8) On page 2, at the end of row 5, edit text to read:

Page 2 of 2

Week Three: Editing Screen Contents

- 1) On row 1, change the text color to white and apply double-text size formatting
- 2) On row 11, change the text color to yellow, apply bold formatting, and underline text
- 3) On rows 12-19, change the text color to white
- 4) On rows 16-19, change the text color for the menu numbers to yellow
- 5) On rows 1-4, change the background color to dark red
- 6) On rows 6-23, change the background color to dark blue
- 7) Move text on rows 11-19 to the right, starting at col 15
- 8) Move text on row 1 down to row 2
- 9) Center text on row 2
- 10) Clear menu numbers and text on rows 16, 17, and 19

Week Four: Working With Links

- 1) On page 1, create the following links for menu options:

#1 – link to screen name PE2
#2 – link to screen name PE2
#3 – link to page 2
#4 – link to screen name PE2

Week Five: Working With Images

- 1) On page 1, row 22, col 39, add the <Page Fwd> green key flag image (or flag code: X8)
- 2) On page 2, at the same location add the smiley face flag image (or flag code: SF)
- 3) On page 1, on row 7, col 33, add the NCUP LOGO image THINK1 (image size = 3 rows x 15 cols) with gray foreground on a dark blue background

- 4) Import the FOTO image #12039858 and add on page 2, starting at row 8, col 15
- 5) On page 1, delete the <Page Fwd> green key image, as well as text on row 5
- 6) On page 2, row 21, add the following text in blinking-blue, double-size formatting, centered across row:

CORRECT!

Week Six: Working With Quote Line & Notes

- 1) Add the following text on Quote Line 2 on a dark red background:
TEST
- 2) Add the following note in the Notes Tab:
Testing

FINAL EVALUATION PLAN

Class Interaction Techniques

This course is an independent study, therefore no forum is necessary to set up for students to interact. There will be a place available on the website for the course where students can submit questions and/or comments.

Course Evaluation

Students will provide feedback regarding the online course and its' effectiveness once completing the course. The evaluation will cover questions such as how user-friendly the course was to go through online as well how effective the training itself was, and also provide an area for comments and any suggestions that students have for training improvements.

Student Evaluation Questions

Online Course Evaluation Questions:

- 1) Did you experience any problems viewing the video?
- 2) Did you experience any problems using the course materials, such as the practice screen?
- 3) Were you able to successfully complete the exercises in the quizzes using the assigned practice screen?

Training Class Evaluation Questions:

- 1) Were you able to easily follow along with the lesson plans?
- 2) Were the practice exercises helpful for retaining the information taught in each lesson plan?
- 3) Did you find the lesson plans flowed in a logical manner?
- 4) Was this training helpful for your job?
- 5) Do you feel you are able to create screens on the Bloomberg system?
- 6) Do you feel you are able to update screens on the Bloomberg system?

