



Arrangement by Design Software

COREformance™
Workshop

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Before You Begin

Facilitator Preparation



Estimated module time:

Materials/ Equipment

Computer for each participant
Facilitator computer with Microsoft Word and PowerPoint loaded
User IDs, if required

Miscellaneous Facilitator Notes

Throughout this Facilitator Guide, you will be instructed to “black screen on PPT.” To do this, right-click on your mouse, scroll down and click on **Screen**. Scroll over and click on **Black Screen**. The screen will then be blacked out and not distracting to the participants. To return to the PPT slide, left click on your mouse.

Note: As a shortcut, press CTRL-B to black the screen.

Some systems do not have this functionality so test yours prior to class keeping in mind you can only test it when in projection mode. If your system does not allow blacking of the screen, plan an alternative like using the lens cap or turning off the projector (assuming you can quickly turn it back on).

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Activity Sequence

Module	Activity	Slide	Approximate Minutes
Welcome and Introduction	Welcome, Introductions, Ground Rules, Course Topics	1-3	30
	Total		30
Module 1 ABD for Documentation	Module 1 Objectives	4	5
	ABD Overview	5	10
	ABD for Documentation Demonstration and Practice		1:20
	Total		1:35 (2:05)
Break		6	
	Total		15 (2:20)
Module 2 ABD for OLR	Module 2 Objectives	7	5
	OLR Versus Hardcopy Documentation		25
	ABD for OLR Demo & Practice		30
	Total		60 (3:20)
Lunch		8	60
	Total		60 (4:20)
Module 3 ABD for Training Materials	Module 3 Objectives	9	5
	ABD ID Toolbar Overview		10
	ABD ID Toolbar Functions – Demonstration and Practice		1:20
	Break		15
	Total		1:50 (6:10)
Wrap Up and Practice	Recap Course Objectives and Expectations		20
	Course Evaluation		5
	Practice Time		25
	Total		50 (7:00)

Course Objectives



Module 1: ABD for Documentation

After completing this module, participants will be able to:

1. Set up Microsoft Word for ABD use.
 2. Use the procedure-related icons on the standard ABD toolbar to create a hardcopy procedure.
-
-



Module 2: ABD for Online Reference

After completing this module, participants will be able to use the icons on the OLR ABD toolbar to create an online procedure.



Module 3: ABD for Training Materials

After completing this module, participants will be able to use the icons on the ID ABD toolbar to create a Facilitator Guide with the following sections:

- Title page
 - Confidential page
 - Table of Contents
 - Activity Sequence
 - Module Objectives page
 - Actual module content
-
-



Assessment of learning: Creation of the following sample documents using ABD:

- A hardcopy procedure
 - An online reference procedure
 - A Facilitator Guide
-

Introduction

Course Overview

Purpose of the Course

Welcome to COREformance® Software: Arrangement by Design® (ABD) in Action. This course is designed primarily to teach training professionals, process improvement specialists, and documenters of policies and procedures to use Arrangement by Design (ABD) to create both hardcopy and online procedures as well as training materials.

Background

ABD is an easy-to-use template designed to create instructional design, online reference (OLR) and hardcopy documentation. The ABD software works similar to a Microsoft toolbar. It contains functions that format content using various styles and insert visual queues to highlight key concepts or actions.

Because the ABD format breaks down information in a way that makes it easy to process and convey understanding, anyone in your organization who routinely generates written communication including contracts, proposals and reports will benefit from this course.

ABD will help you:

- Save time in creating documents
 - Ensure consistency among documents created by several individuals
 - Format information so that learners clearly understand it
 - Quickly convey information even at a glance
-

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Welcome and Introduction

Facilitator Preparation



Estimated module time: 30 minutes

Materials/ Equipment

Miscellaneous

- Flip chart pads with easel
- Colored markers
- Projector and screen
- Name tents

Handouts

Participant Guides

Pre-Written Flip Charts

- Expectations
- Parking Lot
- Ground Rules

PowerPoint Slides

- #1 Course Title
 - #2 Introductions
 - #3 What Will We Cover?
-

Continued on next page

Course Introduction

Welcome



Slide # 1

Show: Slide #1 (Course Title)

Say: Good morning and welcome to COREformance Software: Arrangement by Design in Action. My name is _____ and I will be your facilitator. Today we will learn The ABD software which allows you to save time creating consistent and easy-to-use procedures, training materials and other written documents.

Do: Review “housekeeping.”

- Phones and pagers off or on vibrate
- Restrooms
- Emergency exits

Say: This is a one-day class with plenty of interactivity and time to practice. We will have a break in the morning and another one in the afternoon and a break for lunch.

Participant Introductions



Slide # 2

Show: Slide #2 (Introductions)

Say: Now for your introductions. Please share your name, how long you have been with the company, what types of documents you routinely create and what you hope to gain from this workshop.



Expectations

Do: Ask for a volunteer to start the introductions. Continue until everyone has participated. Note the participant’s expectations on the flip chart. You will check that those expectations have been met at the end of the class. Thank the group for their input.

Continued on next page

Course Introduction, continued

Course Topics



Slide #3

Show: Slide #3 (What Will We Cover?)

Say: As you will see in a moment, ABD is comprised of three customized Microsoft Word toolbars. We will learn to use each toolbar separately. First we will learn to use the standard ABD toolbar. This is the toolbar that allows us to:

- Set up headers and footers
- Insert title pages
- Build a table of contents
- Format information into modules, sections and segments
- Create step/action tables including embedded tables for documenting step-by-step procedures

To practice using all of these functions, we will create a sample step-by-step procedure.

In our second module, we will take the same step-by-step procedure and format it for publication online. The OLR toolbar facilitates a streamlined layout that minimizes scroll and is HTML ready. The OLR toolbar allows you to create a document that can be saved as HTML format and posted to a website or OLR system.

In our final module, we will use the ID or instructional design toolbar to create a facilitator guide. Our guide will contain icons and other visual queues that make it easy for a facilitator to use the materials.

Finally, we will discuss how the functions you have learned can be applied to other types of written communication.

Module 1: ABD for Documentation

Facilitator Preparation



Estimated module time: Approximately 1 hour and 35 minutes.

Materials/ Equipment

Miscellaneous

- Flip chart pads with easel
- Colored markers
- User IDs and passwords, if necessary
- Nominal prizes for volunteers (pens, candy, etc.)
- ABD for Documentation Activity

Pre-Written Flip Chart ABD Hierarchy

PowerPoint Slides

- #4 Module 1 Objectives: ABD for Documentation
 - #5 Benefits of ABD
 - #6 15-Minute Break
-

Classroom Preparation

- Open Microsoft Word on the facilitator computer. Do not access the ABD template.
 - Open the ABD for Documentation Activity.
-

ABD Overview

Transition



Say: Now that you know what ABD can do for you, let's get started learning how to use this powerful template.

Module 1 Objectives



Slide # 4

Show: Slide #4 (Module 1 Objectives: ABD for Documentation)

In this module, we will learn to use ABD. We will:

- Set up Microsoft Word for ABD use.
 - Use the procedure-related icons on the ABD toolbar to create a hardcopy procedure.
-

ABD Look and Feel



Do: Distribute the ABD for Documentation Activity.

Say: This procedure was created using ABD. Notice some of the features of the document that ABD helps you easily format.

Ask: What do you see? *Expect Answers:*

1. *Each page has a consistent header and footer.*
2. *Confidentiality page.*
3. *The system automatically creates the table of contents based on the styles used. For example, the style for the Module title is different than the Section style so the Table of Contents indents each heading appropriately.*
4. *The left column where you see Summary and Procedure written on is where we note segment titles. Content is on the right column. This format leaves sufficient white space to make the document easy to read and to allow space for notes.*
5. *Step/Action tables with embedded tables.*

Turn to Page 6 in your Participant Guide as we discuss the benefits of ABD.

Continued on next page

ABD Overview, continued

Benefits of ABD



Pg. # 6



Slide # 5

Show: Slide #5 (Benefits of ABD)

Say: Arrangement by Design®:

- Promotes consistency among the documents your company produces
- Cuts style and formatting time
- Helps adults more easily learn and process information
- Saves time and money

Because ABD lays over Microsoft Word, you can change styles produced in the document, but you cannot alter ABD itself. For example, when you select a module title, Word displays your module title with the default characteristics of 18-point, bold, Arial font, centered. You can change any of those characteristics, but the next time you select the icon, ABD will change the title back to the default characteristics.

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ABD Demonstration and Practice

Prepare to Document



Pg. # 7

Do: Close the ABD for Documentation Activity but leave Word open.

Say: I am going to show you how to use this time saving tool to create procedures. I will demonstrate a few steps and show them on the screen then give you a chance to try it out. Please watch the screen while I demonstrate so you don't miss any important details. Follow along with the procedure for creating an ABD document in your Participant Guide starting on Page 7.

Before we get started documenting, we need to do a few things to get set up.

Ask for a volunteer to read the steps in the Prepare to Document section of the procedure.

Do: Follow the steps as the participant reads. Interrupt as needed to elaborate on the functionality of the system.

Step	Action
1	From the File menu, select New. The system displays the New Document pane on the right side of the screen. Note: You cannot use the NEW icon here if you wish to select ABD.
2	Click the On my computer link. The system displays the Templates screen.
3	On the General tab, select ABDv9 and click OK. The system displays a blank document in the ABD template with specific ABD toolbars at the top of the screen. Note: After the first use, the New Documents pane displays the ABD template in the Recently used templates section.

Say: Notice these are standard steps for opening any template in Word. You may have used these same steps to use the Memo, Letter or other template.

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