

DM/DG Workflow: Training Artifacts

Metadata Management & Data Governance (DM/DG) | Version .10 Excerpts

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The original document was modified and some pages removed.

Introduction

Definitions

Training artifact – refers to a single PowerPoint slide deck or lesson targeting on the topic of a specific Quest Erwin DI or BUP module and workflow. Decks range from 75 to 150 slides.

Content – includes all text, interactive, visual or audio content that is part of the end users usage and training experience.

Technical content – written technical (text) content that provides end users with key-stroke level instructions in Erwin DI BUP functionalities. This includes but is not limited to:

- Navigating Tab and Drop-down menus from the UI
- Instructions for scanning, mappings source and target inputs
- Configuration parameters

Visual Content – logos, graphics, screen shots, figures, illustrations, and tables.

Instructional Content – arrows, ovals, boxes, and connectors, highlighted lines.

Cycle Time Baseline

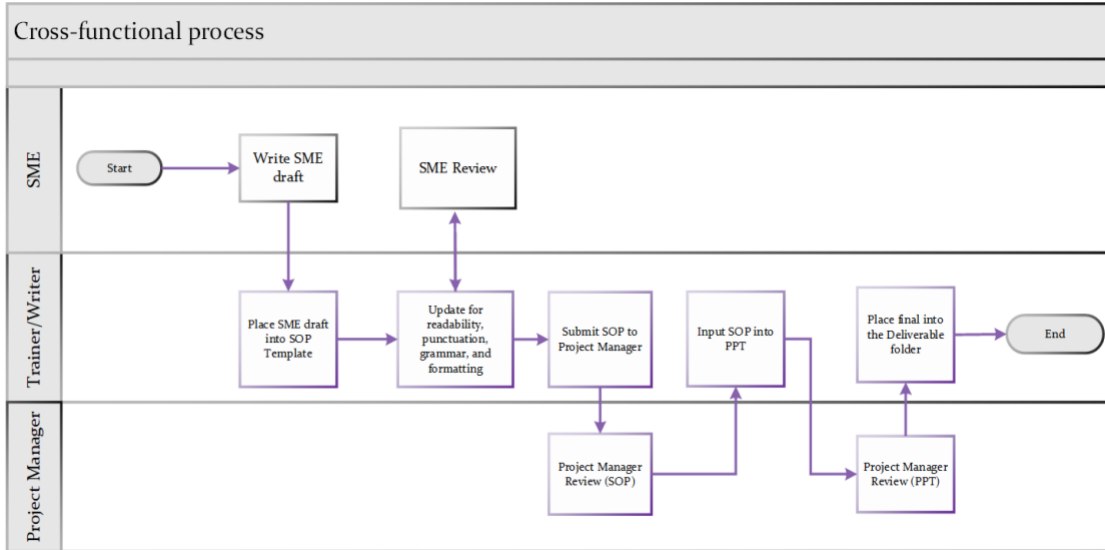
The baseline cycle time is approximately three (3) slides day per day, consistent with other federal government agency's cycle time baseline to produce a training document on the topic of a complex leading-edge technology product when the trainer is not the SME. This baseline estimate accounts for revisions, modifications, rewrites, and approvals.

Process

Process implementation

The Evergreen process for continuous update and improvements using deferment intervals of 2-weeks to 1-month. The process will be mediated and supervised by the DM/DG Project Manager.

Cross-functional workflow



This diagram describes the cross-functional flow of tasks between the Subject Matter Expert(s) and the Trainer as applies to the creation, authorship, revision, editing, and overall development of training artifacts. Once the SMEs and DM/DG team approves the technical content, the trainer will input the written content to a Master PowerPoint file for final review. The PowerPoint file is the final CMS-client deliverable.

Process Steps

Requirements – SMEs and Trainer gather requirements from the CMS Data Strategy Team and Nimbus resource to identify appropriate identify required project artifacts and content. The process is iterative and continual. Requirements are maintained and versioned in SharePoint.

SME Drafts – ‘SME draft documentation’ is written and passed off to the Trainer.

Design Standards –Applies CMS-brand standard to standardize the look and feel of the documents’ text and visual content.

Plain Language –Trainer copy edits the SME draft for clarity and use of accessible language, per the The Federal Plain Language Act of 2010.

SME Review –Trainer delivers the draft to the SMEs to review for technical accuracy. SMEs do not modify design elements or instructional elements, or page formatting.

508 Compliance –Trainer applies 508 compliance Alt tags to document elements.

Peer Review –Trainer initiates the Peer Review and Project Manager Review to begin the process of document sign off upon after completion of Review.

Project Manager delivers the internally approved PowerPoint document to the **CMS COR**.

Delivery –The contractually delivered document is shared in two cloud-based repositories: RELI Group, Inc’s SharePoint portal and CMS-CPI-DASG Enterprise Confluence wiki.

Document Template

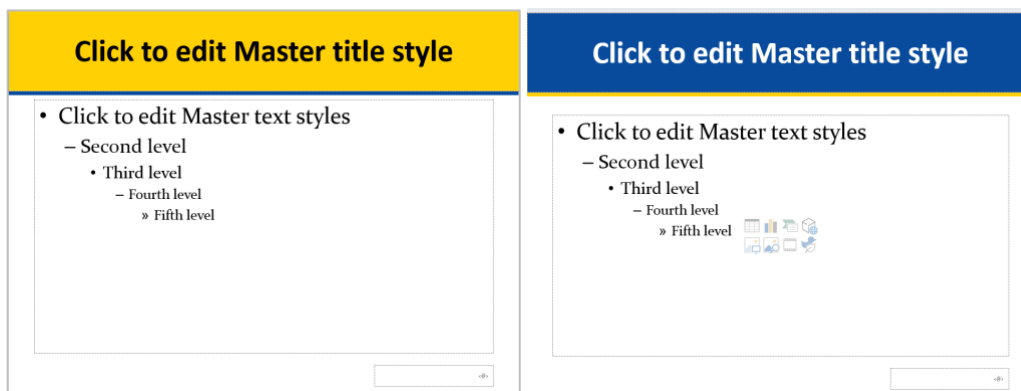
CMS-Standard

Training artifacts will follow CMS-standard template I created June of 2021. The template can be retrieved in SharePoint. Navigate to OY 1, then Deliverables and ‘Template’. All content must fit within the slide’s height, width, and margins (minus the width and height of the slide title).

This is a CMS-standard cover page utilized for all Training documents.



Below are the second and third-level ‘Master Slide’ view of CMS-standard template.



Page Layout

Layout of individual slides integrates the written technical content supported by screenshots of the relevant functionality. Screenshots are captioned.



Positioning of content, screen shots, captions, and bulleted lists can be customized to best illustrate the functionality while allowing white space to minimize the users' cognitive load whenever possible.

Style Guide

- Chicago Manual of Style
- AP Stylebook

Mechanics

Punctuation – use American Standard punctuation.

Spelling – spell all User Interface(UI) elements, labels, and names to match their appearance on the web page.

Capitalization – capitalize User Interface(UI) labels and names to match their appearance on the web page.

508 Compliance

1. Once the document has been approved, screen shot and instructional elements are grouped using the PowerPoint "Group" elements function.
2. Add the Alt text to each "group" using PowerPoints "Edit Alt text" function.
3. Run a "Check Accessibility" scan of the entire document.
4. Mark instructional elements (arrows, boxes, ovals) as "decorative" where necessary.

Appendix A: SharePoint

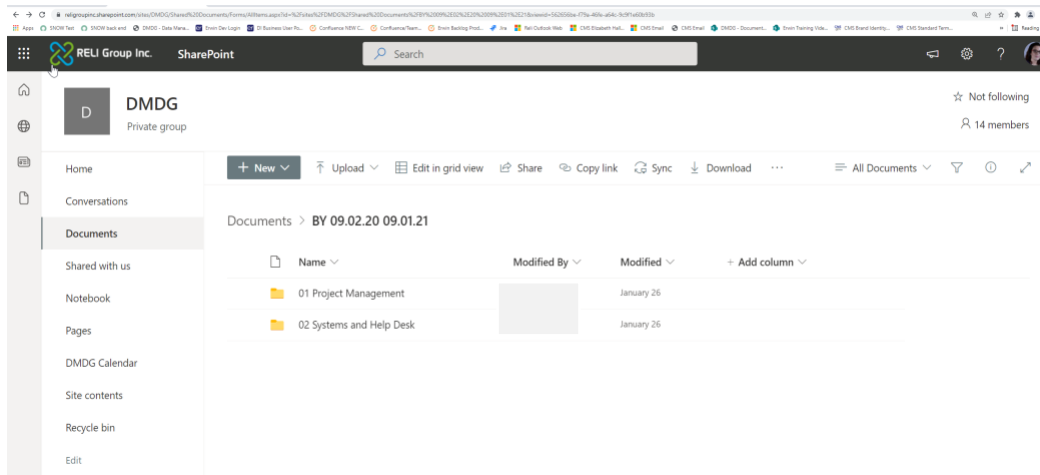


Figure 6-1 reflects the location where finalized versions (in PDF format) of deliverables and internal documentation will be accessible. The link appears below. From the menu on the left (by functional area), users will navigate to house native documents while they are in development.

<http:// URL TO SHAREPOINT REDACTED>

Appendix B: Record of Changes

Include the document control table below at the end of each artifact. Delete the table once the artifact is approved and before it is delivered to the clients.

Version Number	Date	Author/Owner	Description
0.1	02/07/2022	Elizabeth Hall	Initial document
0.2	02/15/2022	Elizabeth Hall	Updated from Peer Review
0.3	02/07/2022	Elizabeth Hall	Updated Section 5
0.4	02/15/2022	Elizabeth Hall	Updated process flow

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