

Turning the Ship

Implementing eXtyle in a Large, Multi-Workflow Organization Or How a Large Research Institute Developed Training

Marceline Murawski and Nathan Yates

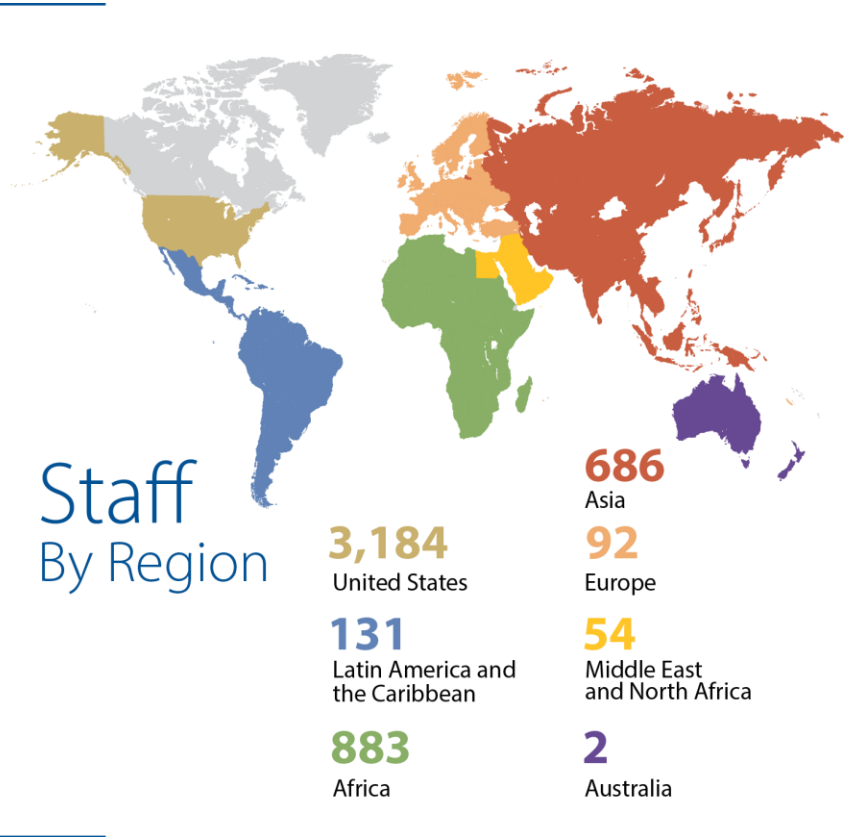
Diverse Global Workforce

5,032 Staff
Members
Worldwide

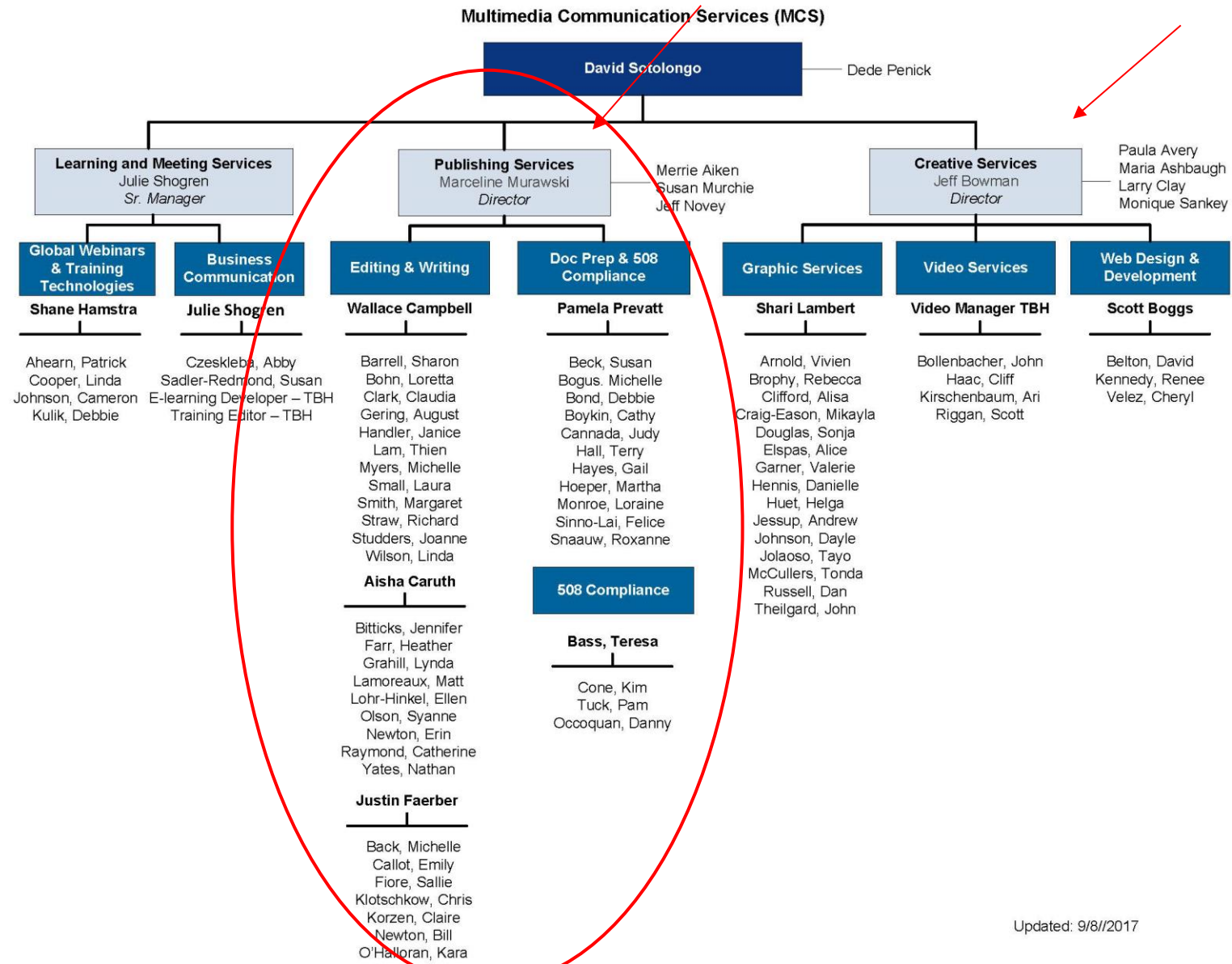
90 
Languages

250 
Degree Fields

105 
Nationalities



Multimedia Communications



Updated: 9/8/2017

What We Will Share Today

Different ways we approached training and documentation

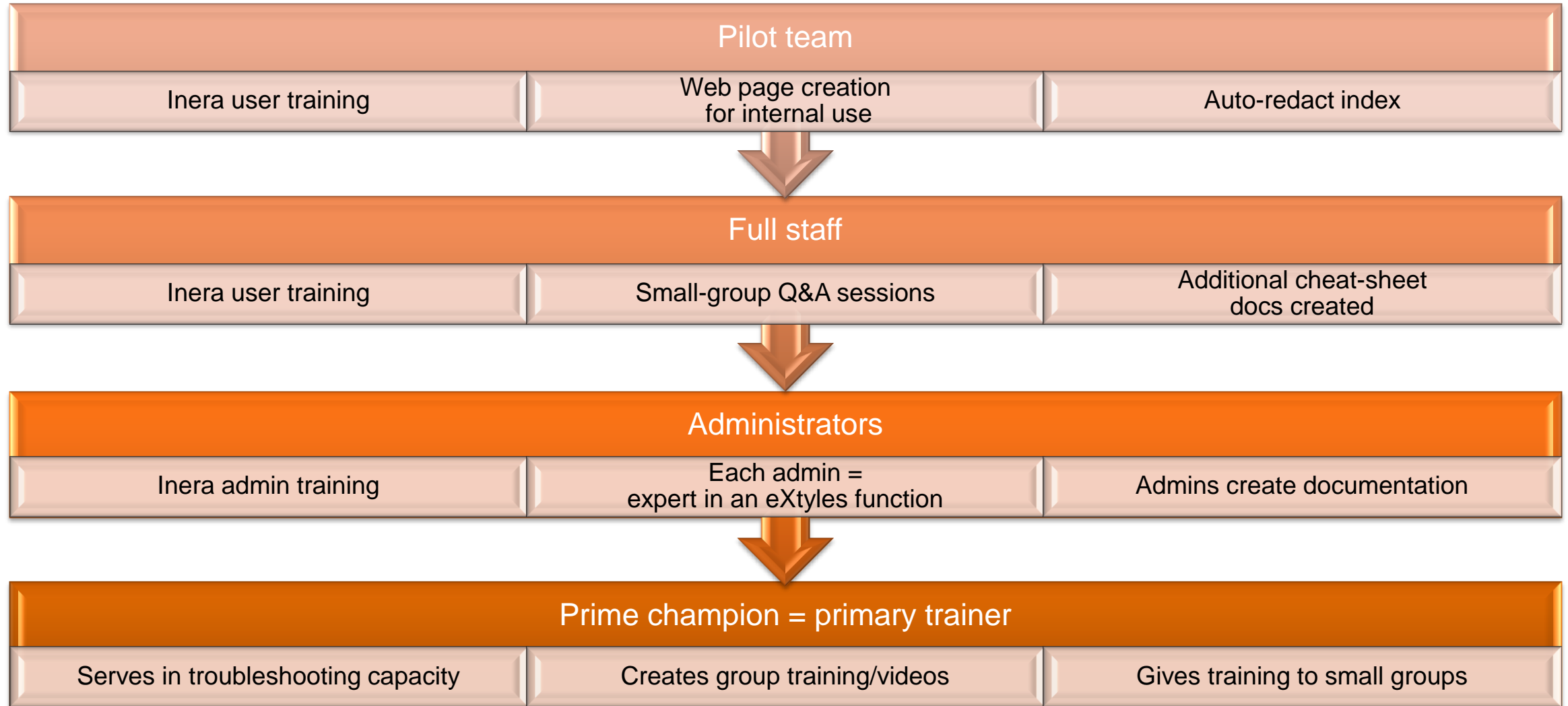
- User guides focusing on popular functions that cause problems for staff
- Ideas for reaching off-site staff
- Training of different-size groups

How we positioned staff members to help with eXtyle rollout

- Designated different staff into “experts” in certain functions of eXtyle
- Identified champions early and empowered them to explore implementation barriers



RTI's Stepwise Approach to Training



Pilot Team: Inera User Training and Follow-Up

Started with Inera User Training

Trained about 8-10 staff members representing all areas of multimedia communications

editorial

production/layout

graphics

web

accessibility

Communicated in meetings and Skype threads

Identified modifications to the templates

Identified additional training and documentation

Identified actions needed



☆ DOC PREP *_WORK_*

> 12 participants

Thursday



Pam Prevatt

holler if you need me to put out a call for work. i know so some large tasks in hand.



Judith Cannada

i'm good for the rest of today



Cathy Boykin

I'll need work in a few minutes



Susan Beck

I'm also good for the rest of today.



Roxanne Snaauw

I'm back and have a short job but just got a heads up on s coming--just not sure when



Judith Cannada

PPT job in OTR for anybody looking for work



Cathy Boykin

I just picked it up



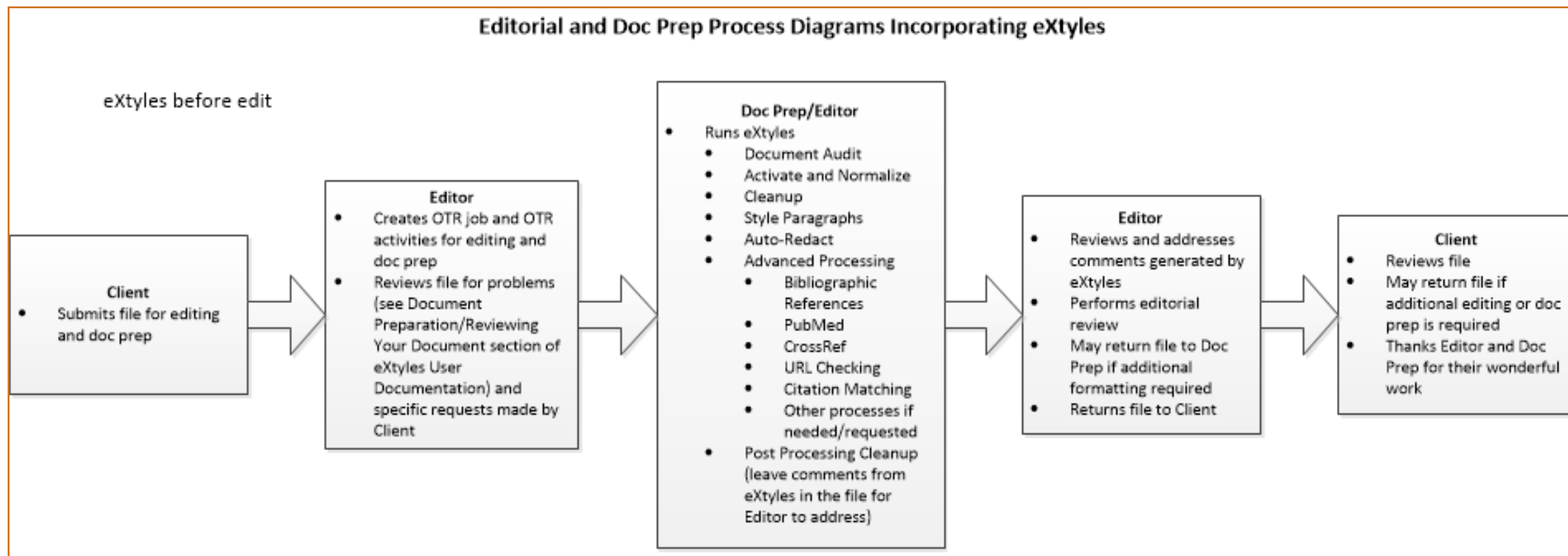
Judith Cannada

Pilot Team: Prep for Full-Staff Inera Training

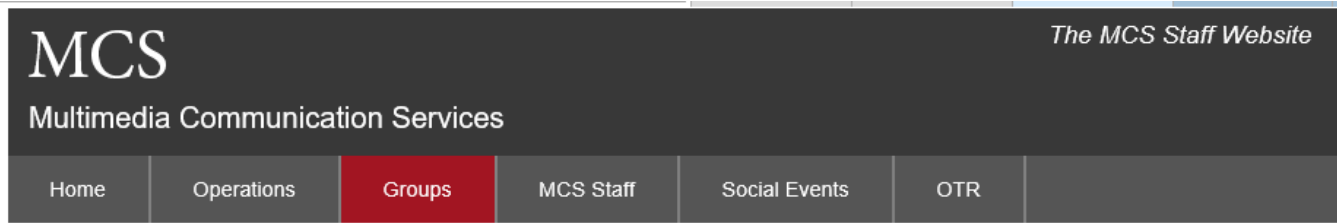


- Drafted process diagram
- Developed resource web page for staff
- Created an auto-redact rule list that users could refer to
- Had a 10-day email countdown to training, focusing on one element of eXtyle per day

Original Process Diagram



Pilot Team Outcomes: Web Resources



eXtyles

eXtyles Resources

Getting Started

- [eXtyles User Guide](#) (pdf)
- [Training Preparation](#) (pdf)
- [Enabling Macros](#) (pdf)
- [Examples of the eXtyles Steps](#) (pdf)
- [eXtyles Features Matrix](#) (docx)



Best Practices and Procedures for Using Some eXtyles Features

- [Refresher Training Video \(May 2017\)](#)
- [Reference Training Video](#)
- [Reference Tools](#) (pdf)
- [Process Diagram](#) (pdf)
- [Finding and Replacing Styles](#) (pdf)
- [Heading Numbering](#) (pdf)
- [Maintaining Tracked Changes](#) (pdf)
- [Handling References](#) (pdf)
- [Handling Reference Tags](#) (pdf)
- [Auto-Redact Rules](#) (xlsx)



External eXtyles Links

- [eXtyles Homepage](#)
- [eXtyles FAQ and Support](#)



Pilot Team Outcomes: Auto-Redact Rule List

autoredact list - Excel

File Home Insert Page Layout Formulas Data Review View ACROBAT Tell me what you want to do							
<div>Clipboard Font Alignment Number Style</div>							
B7 X ✓ fx Changes "anaemi" to "anemi". Also covers:							
	A	B	C	D	E	F	G
1	Rule Type	Description					
2	British to English	Changes "acknowledgement" to "acknowledgment". Also covers: acknowledgements to acknowledgments					
3	British to English	Changes "aetiolog" to "etiology". Also covers: aetiolog to etiology aetiology to etiology aetiologic to etiologic aetiological to etiological aetiologically to etiologically aetiologist to etiologist					
4	British to English	Changes "ageing" to "aging".					
5	British to English	Changes "aluminium" to "aluminum".					
6	British to English	Changes "amongst" to "among".					
7	British to English	Changes "anaemi" to "anemi". Also covers: anaemic to anemic					
8	British to English	Changes "anaesthes" to "anesthes". Also covers: anaesthesia to anesthesia					
9	British to English	Changes "anaesthetic" to "anesthetic". Also covers: anaesthetics to anesthetics anaesthetic to anesthetic					
10	British to English	Changes "anaesthetise" to "anesthetize".					
11	British to English	Changes "anaesthetise" to "anesthetize".					
12	British to English	Changes "analogue" to "analog" and "analogues" to "analog".					
13	British to English	Changes "analysation" to "analyzation".					
14	British to English	Changes "analysable" to "analyzable".					
15	British to English	Changes "analyser" to "analyzer".					

Sheet1 Sheet3

Ready


Full Staff Rollout: Inera User Training

Inera User Training

- About 25 trainees
- Classroom environment
- More variables than we had anticipated



Full Staff Rollout: RTI Staff Training


- 
- Brown bag lunches with users to answer questions.
 - Mostly face to face, but some users called in on phone line
 - A couple of pilot team members were available to answer questions
 - We would use the screen-sharing interface
 - Added a few RTI created custom user guides added to the internal eXtyles webpage.

Staff Rollout: Outcomes

- Identified staff to be eXtyles champion
 - a subset of these champions took Inera's administrator training
- Identified publication to pilot workflow
 - Need for custom Auto-Redact rules
 - Create a new template

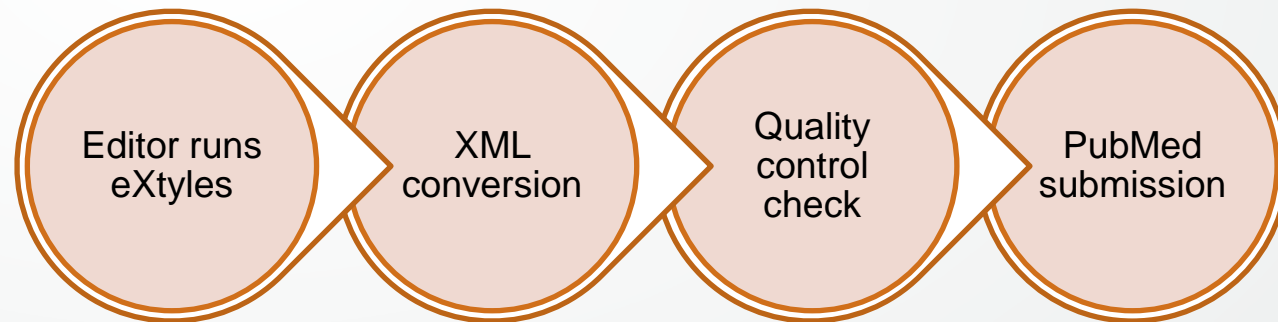


Inera Administrator Training

- 
- Identified champions from each field
 - Editor (Auto-Redact)
 - Doc prep (Word templates)
 - Web (XML/coding)
 - Graphic designer (XML/coding/InDesign templates)

Inera Administrator Training: Outcomes

- Customized publication
- New workflow and associated documentation



Other RTI Training Actions: Large-Group Training

The screenshot displays a web browser window with the address bar showing <https://rti.connectsolutions.com/p54d8b3204b/?launcher=false&fcsContent=true&pbMode=no>. The browser tabs include "Group Resources: eXtyle", "eXtyle Training Session:...", and "staffnet.rti.org".

On the left, a sidebar titled "Events Index" contains a search bar, a "Filter Events" dropdown, and a "Sharing [0:00:00]" section.

The main content area shows a document viewer for "Example_proposal.docx - Word". The document is titled "Share - Shane Hamstra 3". The viewer displays a multi-page document with the following visible content:

- Page 4:** A paragraph discussing "Combinations of Indicators" and "GIS analysis", mentioning "Incinerators, hazardous waste sites, and power plants" and "GIS analysis, using readily available data layers such as NHDPlus".
- Page 5:** A paragraph discussing "GIS analysis" and "GIS analysis, using readily available data layers such as NHDPlus".
- Page 6:** A paragraph discussing "GIS analysis" and "GIS analysis, using readily available data layers such as NHDPlus".
- Page 7:** A paragraph discussing "GIS analysis" and "GIS analysis, using readily available data layers such as NHDPlus".

The taskbar at the bottom shows the following open applications: "Group Resources: eXtyle", "Publishing Services...", "Example_proposal.docx", "C:\Users\ryates\Des...", "Skype™ - nathan.s.jay...", and "Publishing Services L...". The system clock indicates the time is 2:13 PM on Thursday, 5/4/2017.

Other RTI Training Actions: Created More Custom Guides

Using eXtyles to Check References

Introduction

The eXtyles system provides a set of powerful formatting and editing tools. In ideal cases, we can run each tool on a document. However, this is not always possible. Even when you cannot use all the tools, there are some that can be used on their own that will make your job easier. This guide provides describes three of the Advanced Processing commands in eXtyles to check a list of references and gives general instructions on how to use them. The three commands are Bibliographic References, PubMed Reference Correction, and CrossRef Reference Correction.

Reference Commands

Bibliographic References will format your reference list in APA style. It works best with journal articles and books/book chapters, but it will also try to clean up other types of references.

This command tags references by type and applies character styles to the parts (elements) of the references it recognizes.

The reference type tag shows up before and after each reference. The tags are:

- | | | | |
|--------|------------------------|-----------|------------------------|
| • jrn | Journal article | • lgl | Legal case or statute |
| • bok | Book | • ths | Thesis or dissertation |
| • edb | Edited book or chapter | • other | Other |
| • conf | Conference proceeding | • unknown | Unrecognized |
| • eref | Website | | |

The elements (e.g., author surname, author first name, article name, volume) of the references are assigned different character styles in Word. They can be recognized by the colors of shading assigned to each element. For references that eXtyles does not recognize, less information will be shaded. The

Other RTI Training Actions: Small-Group Training

Mix of new users and refresher training

2 or 3 people

Led by staff champion

Focus on specific details, issues users are experiencing





delivering **the promise of science**
for global good



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