ONGOING CNA TRAINING AND DEVELOPMENT PROCESS

Task Definition:

[More information to follow as it becomes available]

Purpose:

Process Steps:

A. Meetings

B. Documentation

C. Schedules

D. Roles (Category leader, institutional representative, etc.)

E. Repositioning

Time Line:
REPORTS & SCREENS

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I. DOCUMENTATION

A. Updating the Documentation Book

This section is to help future employees understand how to update the documentation booklet. This booklet will become obsolete unless it is updated as changes are made to the system. Generally, the BYU CNA Center will handle all documentation updating. Copies of changes, additions, and deletions will be sent to each school periodically.

1. **Duplicates:** The challenge with this documentation has always been to make it complete and accurate. Unfortunately, past attempts to correct sections or update existing documentation have frequently created new problems. Since all of the CNA computers are not yet linked through a departmental network, it is possible to have multiple copies of the same file existing on two or more computers. When this occurred in the past, one file would get updated, while the other would remain unchanged. Obviously, this eventually created confusion. *Do not duplicate the files that comprise the documentation book.*

2. **Formatting:** It is a good idea to keep the format the same throughout the book. There will be times when you may want to modify something in a way that is not similar to the current format. *Keep such formatting changes to a minimum.* This book is big enough that a person could waste lots of time just modifying the formats, but the time really needs to be spent maintaining and generating documentation. The basic format is to have half inch top and bottom margins, inch side margins, and 11-point CG Omega font for most of the text. Main titles are 14-point and tables are 8-point. Everything that shows what the database looks like is in Courier font (because it transfers without messing up the spacing using this default font), and also 8-point size.

3. **Documentation Setup:** When the time comes to make some sort of modification to the documentation, please make sure you first know what you are doing. Otherwise you may do something the long way, an incorrect way, an inefficient way, or in a way that actually destroys the formatting codes that are already part of the documentation. If you don’t already know how to use the *Reveal Codes* feature of WordPerfect, you need to educate yourself before you start making changes. The same applies to some of the feature tools that are used in the documentation. Make yourself aware of the following points that relate to the documentation:

   i. Each section has an index that can be regenerated automatically if the page numbers change. The sections were set up using the Table of Contents tool. Basically, the title of each report or screen has been marked as table of contents level 2 and the major divisions have been marked as level 1. Reveal the codes in one of the sections and go check it out. If you add a new report, make sure you add the appropriate level marking too. To regenerate the index in each section, choose generate from the Table of Contents toolbar. *Never manually retype the reference page numbers within a section.* Instructions for using the Table of Contents feature can be found within WordPerfect by selecting Help, Search for Help on, and then looking up “table of
contents.” This section describes the steps that are used to develop a table of contents.

ii. Each tab has been numbered using the Page Numbering tool in the format menu. If you need to change the tab number, do so by changing the value that is designated for the section under format-page-numbering. Again, in the Help menu search, look up “page number” to see more information about how to use or modify the page numbering.

iii. Each section contains a footer that will show the filename/path and the current date. No section should have a header.

iv. In general, whenever you see items listed in an A, B, C, type list, the letters are generated using the Outline tool. This was done so that documentation items can be inserted or removed if necessary, and the letters will automatically readjust instead of needing manual adjustment. If you are trying to insert an item, first be familiar with how to use the Outline feature. Select the feature to display the outline level in the left margin and use the outline toolbar buttons to add a new level. Again, if you don’t know what you are doing, don’t make any changes until you have first educated yourself. The outline definition is a user-defined definition, called “Alpha.” If you create a new document it will not automatically let you select this option. On the Outline toolbar, select options-define outline-options-retrieve. The path is c:\wpwin\outline. This lets you retrieve the outline setup into your new document.

v. When it comes time to get a screen print of a new screen or a new report, make sure you understand multi-tasking. This may be basic for you, but Alt-Tab will let you switch between two open applications. Open WordPerfect and the RS-6000 (telnet) simultaneously. Select the text on the screen of the RS-6000 application you want to copy and choose edit-copy. Then switch back to WordPerfect and simply paste the clipboard material you copied into your document. You’ll notice that the screens in this book are enclosed in a dotted box. It is simply a text box with a dotted border. The margins are reduced half an inch for screens. *Never try to type periods around material to simulate a box.* Remember, the font used to represent a facsimile of the RS-6000 screen is always Courier.

vi. The initial index section that is at the beginning of the book is not set up to renumber using the table of contents or cross-reference tool. It is not possible to make it a master document (with the other tabs as sub-documents) because each tab section would then generate an index that would list every item in the other sections also. Suffice it to say that we looked into this option, but found it unfeasible. It is simpler to just update the initial index manually—just remember to do it when the numbering of any section changes.

4. **Updating Documentation Books to Show Changes:** Whenever changes occur to any of the files that comprise this documentation book, it is necessary to ensure that new sheets reflecting the changes are sent to each documentation book (10 total). In order to do this
efficiently, changes will be sent in batches. When a change is made, add the appropriate
entry to the documentation changes register (d:\sec\wpwin60\document\document.97—
\changes.xls). This register is designed to keep track of documentation changes as they
occur. It also provides a record of which changes have been sent to which institutions.

5. **Incorporating/Updating Flowchart Diagrams:** Flowchart diagrams are found in
several tabs throughout the documentation book. These flowcharts were created using
Visio. The Visio files have been embedded into the WordPerfect documents, and the
Visio flowcharts can be updated while in WordPerfect. To insert a new flowchart, first
create the drawing in Visio, then copy and paste it into WordPerfect. To update an
existing drawing that has been embedded into WordPerfect, use the following
instructions:

i. To update a flowchart, double click on the chart in WordPerfect (note: the computer
you are on must have Visio installed for this to work). The system will open a
window within WordPerfect that allows you to make changes using Visio.

ii. Click on the zoom button (or “View, Zoom”) and you will be asked if you want to
open Visio in its own window to zoom. Choose yes, and you will then be able to use
Visio regularly.

iii. Make the necessary changes to the drawing. When finished, select “File, Exit and
return to ______.xxx.” This will exit you from Visio and return you to the
WordPerfect document.