
WBT checklist for editors

Instructional design

- Course objectives are listed in an overview or introduction
- Each course objective is supported by one or more lessons
- Each lesson begins with specific objectives to meet the main objective of the lesson (recommended maximum of seven objectives per lesson)
- One or more topics are included for each lesson objective and in the same order (with subtopics as appropriate)
- Lesson objectives list actions that can be tested online
- Each lesson concludes with a learning check (or other learning activity)
- At least one learning check item is included to test each lesson objective
- All learning check items provide appropriate and consistent feedback (three-part feedback recommended: correct or incorrect, why or why not, and next action)
- Content is segmented into small chunks and labeled appropriately
- Any supplemental information is provided using links or PDF files (ensure that supplemental Word, PowerPoint, or Excel files have been converted to PDF format)

Page design

- Pages are designed with format variety and ample white space
- Text begins at the top left in most instances
- Paragraphs are small (even more so than in a printed document)
- Bulleted lists do not contain a large amount of text (subheads and small paragraphs are used instead)
- Pages do not scroll horizontally

Menu items and topic titles

- All menu items and topic titles match (although a condensed version of the title can be used in the menu to avoid horizontal scrolling)
- Each topic title is unique (required for the search tool to function properly)
- Similar menu items are structured to not begin with the same words, which makes searching the menu easier (for example, *[Product name] features* would be preferable to *Features of [Product name]*)
- Items and titles are concise, have parallel structure, and reflect the content accurately

Style and format

- Proper style and format is used (such as use of bold, subheads, and alerts; no italicized text except with titles of publication; no shadowed text; and no underlines except with links)
- Spelling and grammar is correct
- Punctuation and capitalization (sentence case) is correct and consistent
- Lists have parallel structure and contain at least two items
- Tone and language is appropriate (informal but not conversational, primarily active voice, present tense, second person, and not gender specific)
- Word usage is appropriate (free of words that do not translate well, figures of speech, slang, jargon, and contractions)
- Clear and concise wording is used with proper sentence structure and sentence variety (compound sentences are avoided)
- Consistent terms are used throughout
- Full product and company names are used on the first mention in each lesson
- Acronyms are defined on the first mention in each lesson (but not in titles or headings)

Note

First person and contractions are acceptable in direct quotes and dialogue.

Graphics and media

- Graphics are legible, clear, and appropriately sized and positioned
- High-quality graphics are used that are simple, straightforward, and realistic
- Photographs have square corners
- Captions are included above or below graphics that need identification or explanation
- Every graphic and form of media (such as an animation or video clip) has a caption to display a rollover alt text tag
- Media provides user controls and functions properly
- Media provides ample instructional value to substantiate the increased file size
- Audio uses the appropriate conversational tone

Pop-ups (windows and layers)

- The text in the link and the pop-up heading are identical
- Pop-ups are sized appropriately (layers are not larger than two-thirds of the screen)
- Pop-ups are positioned appropriately
- A consistent format is used
- Pop-ups do not contain links or crucial information (such as important, caution, or warning alerts)

Links

- All links function properly
- Every link has a caption to display a rollover alt text tag
- Links to subtopics contain text that is identical to the subtopic heading
- Links to websites open in a separate browser window with all window controls visible
- Links to intranet sites and to Internet sites are clearly differentiated
- If the audience listed on the splash page includes customers, links to intranet sites are not included
- Directive text is not included for links (which are intuitive)

Miscellaneous

- The course title does not include *WBT* or *web-based training*
- A security label is included on the splash page if applicable
- The legal notice is correct
- All topics are accessible from the Contents menu
- Features available from the top menu bar work properly
- All navigational options work properly
- All acronyms used are included in the glossary (for courses that contain a glossary)