

# Documentation Tool Tutorial

Tutorial for Creating a Documentation Tool Interactive in the Texas Gateway

## Introduction

The Documentation Tool interactive serves as a wizard that can help learners easily document and evaluate goal-driven activities. The interactive can also be used as a form wizard. The pages and elements of the wizard are fully customizable and learners can download a copy of the information they've entered in the form.

In this tutorial, you will learn how to create a Documentation Tool interactive within the Gateway. Here's the interactive we'll create:

<http://projectsharetx.org/resource/documentation-tool-tutorial>

## Step 1: Inserting the Interactive Editor

You can add interactive content to a resource using the same process you would use to add other content types (HTML, video, and audio). While in the content page you would like to add the interactive to, click the **Insert** button under the **Add Content** section. Then select **Interactive** from the dropdown.

**Create & Edit Content Pages**  
(Content Pages appear in the Content Page(s) column at left after being added)

➔ BACK TO STEP ONE

**1. Edit Content Page Details**

Content Title \* Introduction

Language English

➔ UPDATE CONTENT INFORMATION

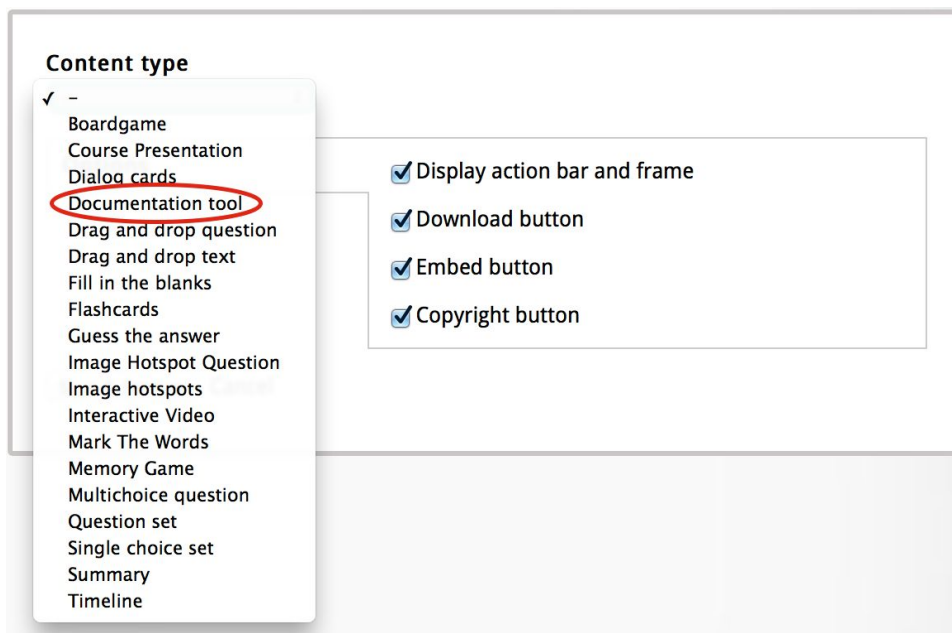
**2. Add Content - HTML, Videos, Audio & Interactive**  
(Insert subcontent to create content pages)

No Subcontent exists.

INSERT ▼

- HTML
- VIDEO
- AUDIO
- INTERACTIVE**

In the dropdown under **Content type**, choose **Documentation Tool**.



The interactive editor will appear. Follow the steps in the editor.

## Step 2: Adding a Title and Label for Navigation Menu

The Documentation Tool editor consists of a title, navigation menu label, pages, and elements.

For this example, we'll create a documentation tool that helps learners document and assess their work on a project. Enter *Project Documentation* as the **Title** for this interactive. In the **Label for navigation menu** field, enter *Steps*. This will be the header for the left hand navigation menu that will guide the learner through each step of project documentation.

## Step 3: Creating the Pages and Elements

The Documentation Tool editor allows you to add the following page types:

- Standard page
- Goals page
- Goals assessment page
- Document export page

For the first page, we'll add a **Standard page** that will describe the project documentation process and prompt learners to enter basic information about their project. Under the **Elements** header, you'll see a tab for the first page. Begin entering information for the page in the section to the right of that tab. Select *Standard page* from

the **Content type** dropdown and then enter *Project* into the **Title** field. Next, begin

#### Title

Project Documentation

Title for the documentation tool.

#### Label for navigation menu

Steps

#### Elements

1. Standard page

Add Page

**Content type**

Standard page

Library for this slide.

**Title**

Project

Title for the page.

**Elements**

Content type

✓ -

Text

Text input field editor element

Image

Add element

adding elements to the page. **Elements** include text, text input field editors, and images. Under

**Content type**, choose *Text* from the dropdown. In the **Text** field, type the following:

*Use this tool to document your work on your Social Studies project for Ms. Bee's class. In order to document your project properly, you should include the following:*

1. Goals
2. Plan
3. Project Work
4. Evaluation
5. Goals Assessment

*It's important you take notes as you complete your project.*

We'll also want to use this first page to ask the learners to provide basic information about their project. In order to do this,

we'll need to add **Text input field editor elements**. Click the **Add element** button under the text element box. This time, select *Text input field editor element* from the Content type dropdown. For the **Description of input field**, insert *Project Title:*. This will prompt the learner to input the title of his project. For **Placeholder text**, enter *Insert Title*. This will appear in the text box where the learner is supposed to input the project title. Once the learner begins typing in the text box, the placeholder text will disappear. Select *1 line* from the **Input field size** dropdown as the learner should be able to fit his title in one line of text. Check the **Required field** checkbox so that the learner will be required to submit this information before exporting the final document.

Click the **Add content** button twice to add two more text input field editor elements. Follow the steps above and enter the following information for these elements:

**Description of input field:** *Start Date:*

**Placeholder text:** *Insert Date*

**Input field size:** *1 line*

Check the **Required field** checkbox.

**Description of input field:** *Your Name:*

**Placeholder text:** *Insert Name*

**Input field size:** *1 line*

Check the **Required field** checkbox.

Under the elements, there are two optional fields that you can use to provide help information for the learner. For this example, we will leave these fields as is.

Add a second page by clicking the **Add Page** button below the tab for the standard page. Select *Goals page* from the **Content type** options. This page will allow learners to define their goals for the project.

Enter *Goals* for the **Title**. For the **Description**, replace the default text with the following:

*Add goals for your project by pressing the button below. You should describe each goal in your own words.*

#### Elements

The screenshot shows the 'Elements' panel on the left with two tabs: '1. Standard page' and '2. Goals page'. The 'Goals page' tab is selected, and an 'Add Page' button is visible below it. The main area displays the configuration for the 'Goals page'. At the top, the 'Content type' is set to 'Goals page'. Below this, the 'Title' field contains the text 'Goals'. The 'Description' field contains the text 'Add goals for your project by pressing the button below. You should describe each goal in your own words.' and includes a rich text editor toolbar with buttons for bold, italic, underline, strikethrough, bulleted list, numbered list, link, and unlink. At the bottom, the 'Define goal link text' field contains the text 'Add Goal'.

**Content type**

Goals page

Library for this slide.

**Title**

Goals

Title for the goals page.

**Description**

**B I U Ix** **≡ ≡** **🔗 🔗**

**Normal**

Add goals for your project by pressing the button below. You should describe each goal in your own words.

body p

Description of the goals page.

**Define goal link text**

Add Goal

Text that will be displayed on the button for creating a new goal.

Insert *Add Goal* in the **Define goal link text** field. This text will be displayed on a button that learners will press in order to create a new goal. Enter *Goal* for the **Label for a user defined goal**. Type *Write here* in the **Define goal placeholder** field. For the remaining fields, keep the default text as is.

Once you've completed the goals page, add three more standard pages by pressing the **Add Page** button three times and following the same steps used in creating the first standard page. Insert the following information for the standard pages:

Page 3

**Title:** *Plan*

**Content type:** *Text input field editor element*

**Description of input field:** *Describe what you are going to do in your project, how you are going to do it and why.*

**Placeholder text:** *Write here*

**Input field size:** *10 lines*

Leave the **Required field** checkbox unchecked.

Page 4

**Title:** *Project Work*

**Content type:** *Text input field editor element*

**Description of input field:** *Describe what you did when you were working on the project. Remember to explain the choices you have made. Refer to the notes you took while completing your project.*

**Placeholder text:** *Write here*

**Input field size:** *10 lines*

Leave the **Required field** checkbox unchecked.

Page 5

**Title:** *Evaluation*

**Content type:** *Text input field editor element*

**Description of input field:** *Evaluate your project work. Were the results of the project as expected? If not, why? What have you learned?*

**Placeholder text:** *Write here*

**Input field size:** *10 lines*

Leave the **Required field** checkbox unchecked.

Add a sixth page by clicking the **Add Page** button. This time, select *Goals assessment* from the **Content type** options. This page will prompt learners to assess how well they've met their goals for the project. For the **Title**, put *Goals Assessment*. For the **Description**, type the following: *Assess how well you achieved the goals you defined for the project.*

Next, we'll define ratings that the learners will use for the goals assessment. Use the following ratings:

**Low rating text:** *Did not achieve*

**Medium rating text:** *Achieved partially*

**High rating text:** *Achieved completely*

Keep the default text for the remaining fields.

Add one final page by pressing **Add Page**. Choose *Document Export Page* from the **Content type** dropdown. This page will allow learners to export the information they've entered. Enter *Complete* for the **Title**. For the **Description**, insert the following:

*Well done!*

*On this page you can choose to export all your submitted text, as well as your goals and goal assessments.*

Keep the default text for the remaining fields.

There is no limit to the number of pages you can add. To remove a page, press the X button in the top right corner of the page box. You can change the order of the pages by pulling the arrows icon in the tabbed list of pages to the left of the page editor.

## Elements

The screenshot displays the 'Elements' panel of a documentation tool. On the left, a vertical list of pages is shown, each with a diamond icon and a number. The second page, '2. Goals page', is highlighted with a blue arrow icon. Below this list is an 'Add Page' button. On the right, the editor for the selected page is open. It features a 'Content type' dropdown menu set to 'Goals page'. Below this is a 'Title' field containing the word 'Goals'. The 'Description' section includes a rich text editor with buttons for bold, italic, underline, strikethrough, bulleted list, numbered list, link, and unlink. A text area below the editor contains the instruction: 'Add goals for your project by pressing the button below. You should describe each goal in your own words.' At the bottom of the editor, a status bar shows 'body p' and a small triangle icon.

1. Standard page

3. Standard page

2. Goals page

4. Standard page

5. Standard page

6. Goals assessment ...

7. Document Export ...

Add Page

**Content type**

Goals page

Library for this slide.

**Title**

Goals

Title for the goals page.

**Description**

**B I U Ix** **: =** **1 =** **Link** **Unlink**

**Normal**

Add goals for your project by pressing the button below. You should describe each goal in your own words.

body p

Description of the goals page.

## Step 4: Adjusting Settings

Documentation Tool editor provides options for adjusting the interactive's settings and functionality.

You can use checkboxes under **Options** to manage the actions that users have access to. The action bar includes buttons that allow users to download the interactive, access the embed code, and view copyright information. If you do not want to provide access to these buttons (or to the entire action bar), uncheck the boxes accordingly.

**Options**

**Publishing options**  
Published

- ☒ Display action bar and frame
- ☒ Download button
- ☒ Embed button
- ☒ Copyright button

Save & Preview Cancel

## Step 5: Completing the Interactive

Once you have finished all of the steps above, be sure to click the **Save & Preview** button. You should now have the same interactive as the example:

<http://projectsharetexas.org/resource/documentation-tool-tutorial>