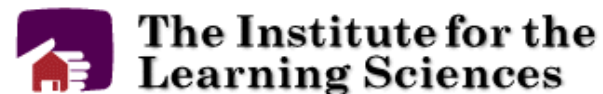


Mark Swanson

Instructional & Interaction Design Samples

Mark Swanson
markswanson@geoscriber.com
online resume: <https://www.geoscriber.com/>





- **Client:** Social Security Administration
- **Project:** Web-based training for SSA mainframe computer systems and Web applications used to review disability claims.
 - Training uses scenario-based learning to teach both customer service and software skills
 - Includes video and simulations
 - Section 508 compliant
- **My role:** Instructional designer/developer
- **Tools used:** Dreamweaver (for DHTML prototype), SnagIt, MS Word (for storyboards)



Welcome - Windows Internet Explorer



Activity 8 - Developing a Medical CDR and Processing a Determination

Welcome

Click **Next** to begin.

Back Page 1 of 82 Next

Done Internet 100%



Getting Started - Windows Internet Explorer

Getting Started

Activity 8 - Developing a Medical CDR and Processing a Determination

Help Map Exit

The scenario in this Guided Practice activity is presented through interactive video clips, multiple-choice questions, and simulations of the software you will use on the job.

Don't worry about making mistakes. A Guided Practice activity is not a test and is not graded. If you don't know the answer to a question or how to perform a step, just click the "Find the Answer" or "Show Me How" button to get guidance — as if you had a mentor by your side. If you choose an incorrect answer, the system will provide specific feedback so you will learn something from every choice you make.

The activity should take no more than 30 minutes to complete. If you need to exit the program before finishing, simply click **Exit**; the program will remember where you left off when you return. If you need more help on using the program, click **Help**.

Click **Next** to continue.

Enable admin

Back Page 2 of 82 Next

Internet 100%



Receiving the CDR Forms

Activity 8 - Developing a Medical CDR and Processing a Determination

Help

Map

Exit

In-Person Interview



Play Video



Display Text

Show Captions

What should the CR do next?

Click the best answer.

- ① Say that he will begin processing the forms right away and will call her if he has any questions.
- ② Explain that if SSA decides to cease the claim, the beneficiary has the right to appeal the decision.
- ③ Begin reviewing the forms carefully to see if any information is missing.

Not Sure?

Find the answer

Enable admin

Back

Page 11 of 82

Next

{PAGE}Page 08-10

{TITLE}Receiving the CDR Forms Help Map Exit

{ACTIVITY} Medical CDR Activity 8: Developing a Medical CDR and Processing a Determination

{MEDIA TITLE}Office visit ({DURATION})

Play the video then click Next to continue.
{INSTR}

Video player area
{MEDIA}

Show Captioned Video

← Back Page x of y Next →

Specifications:

Screen type	Video A: Play
User interaction	The video player appears alone on the left side. If user clicks the Show Captioned Video button, the open-caption version opens in a stand-alone player.
{MEDIA}	File name (standard version): GP08_001.avi File name (open-caption version): GP08_001c.avi [??] Alt text: This video portrays a CR receiving CDR forms from a beneficiary. Duration: [TBD]
{CAPTION}	Video caption text, based on script [Might be implemented by video production, not Web developer.]
{script}	<i>BENEFICIARY and her grandmother JANE SMITH are seated at the desk of claims representative, HARVEY RAMOS. MR. RAMOS is holding a couple of ID cards, having just finished verifying their identification.</i> MR. RAMOS: Thank you, Mrs. Smith. Here are your IDs [<i>hands two identification cards back to MRS. SMITH</i>]. How may I help you today? MRS. SMITH: I received these forms in the mail for my granddaughter Stephanie Hanson. [<i>MRS. SMITH gestures toward BENEFICIARY and places a hand on her arm.</i>] She's getting disability checks. I filled the forms out as best as I could. <i>MRS. SMITH hands the forms to MR. RAMOS.</i>

{PAGE}Page 08-11

{TITLE}Receiving the CDR Forms Help Map Exit

{ACTIVITY}Work CDRs—Activity 3: Handling Incomplete Earnings Information

{MEDIA TITLE}Office visit ({DURATION})

{Q TXT} What should the CR do next?

Click the best answer.

✗ ① {ANS 1} Say that he will begin processing the forms right away and will call her if he has any questions.

✗ ② {ANS 2} Explain that if SSA decides to cease the claim, the beneficiary has the right to appeal the decision.

✓ ③ {ANS 3} Begin reviewing the forms carefully to see if any information is missing.

Not sure? Find the Answer

[Feedback area for in-page feedback. See below for text.]

← Back Page x of y Next →

Specifications:

Screen type	Video B: Answer question
User interaction	Video player functionality/interactivity is the same as Video A screen type. The multiple-choice interaction is the same as the Multiple Choice screen types.
{MEDIA}	File name (standard version): same as previous File name (open-caption version): same as previous Alt text: [same as previous] {DURATION}: [TBD]
{#}	3
{COR ANS}	3
{FDBK 1}	Incorrect. Processing the forms without first reviewing them with the beneficiary is not a good practice. If the forms are incomplete the CR must interview the beneficiary to gather any missing information.
{FDBK 2}	Incorrect. While this information is true, it not the best practice to explain the beneficiary's appeal rights until after the CR has completed the forms.
{FDBK 3}	Correct. The CR should review the forms immediately. If any information is missing or inaccurate, the CR would then interview the beneficiary and/or payee to make sure the forms are complete. Click Next to see what Mr. Ramos does next.
{INC FEEDBK 1}	Try again.
{NO ANSWER}	Don't forget to answer the question before moving on.
{FIND ANS}	A CR's goal is to complete all the forms completely and accurately. A beneficiary rarely completes all CDR forms fully. For example, several parts of form SSA-454 might be inaccurate or incomplete, including: <ul style="list-style-type: none"> • doctor information (address unknown, reason for visit/symptom conflated with treatment) • medications (too general; not specific drug name) • tests (can't remember exact date or name/address of facility) <p>If a payee and/or beneficiary come to a field office in person, the CR should take advantage of the opportunity to conduct an interview to gather any missing information.</p>




Starting CDR2000 - Windows Internet Explorer

Starting CDR2000

Activity 8 - Developing a Medical CDR and Processing a Determination

Your Task: Clear the case to DDS.

Step 1: Start the CDR2000 program. (Assume you are already logged in to the PCOM system and have launched the OQP Tool Bar.)

 [Show Me How](#)

PCOM Session A

File Edit View Communication Actions Window Help

PrtScr PrtSetup ShowPad Copy Paste Cut OQA Toolbar ExitAll

SSA MENU MAIN

SELECT THE DESIRED FUNCTION: 1

1. TITLE II/INITIAL CLAIMS	19. CPS DATA INPUTS/QUERIES
2. TITLE II/PE/MONET/IRMAA	20. DOORS
3. TITLE XVI/IC CLAIMS AND PE	21. RRB DATA INPUTS
4. SHARED PROCESSES	22. ALTERNATE MODE FACILITY
5. ENUMERATION	23. REPRESENTATIVE PAYEE
6. DEBT MANAGEMENT	24. MODERNIZED DEVELOPMENT WORKSHEET
7. TITLE II/INTERACTIVE COMPS	25. WMS LISTINGS
8. TITLE XVI/INTERACTIVE COMPS	26. PC ACTION CONTROL SYSTEM
9. MASTER FILE QUERY	27. PAYMENTS OUTSIDE TITLE II SYSTEM
10. MACADE	28. FUTURE USE
11. APPOINTMENT/REFERRAL/LEADS	29. THIRD PARTY PAYMENT SYSTEM
12. EARNINGS MODERNIZATION	30. COMMON TICKLE
13. INTEGRITY REVIEW	31. ONLINE RETRIEVAL SYSTEM
14. RSDHI DATA INPUTS	32. DISABILITY CONTROL FILE
15. SSI DATA INPUTS	33. PRISON SYSTEM/FUGITIVE FELONS
16. ADMINISTRATIVE APPLICATIONS	34. NETWORK STATUS
17. QDAR DATA INPUTS/QUERIES	35. UNVERIFIED PRISONER SYSTEM
18. NDDSS MASTER FILE MENU	99. RETURN

MB a 03/053

Connected to Host using LU VA420300 . \\5A42AB1\PTR10 on Ne04:

OQP DIB Tool Bar

QM eWork DIBwiz I2Fld T16Fld WhrUnk BPQY DCF CDR2000 POS DR_Tool Menu

MBR (FACT) [Back](#) Page 21 of 82 [Next](#)

Internet 100%



Selecting the Entry Field - Windows Internet Explorer

Selecting the Entry Field

Activity 20 - Work CDR Development: Multiple Employers Involved

eWork - Main Menu - Microsoft Internet Explorer provided by IE6.0 SP1 > Alpha CI

File Edit View Favorites Tools Help

eWork Main Menu eWork Related Links Go eWork Help

PROCESS AN ACTION

For these links, you must enter a BOAN: OR
 Claim Number: BIC:

[Initiate/Update Work Report](#) [Initiate/Update Work Review](#)
[Initiate/Update Recon](#) [Query Work Development](#)
[View Development Worksheet](#) [Request/Transfer Folder](#)
[View Prior Decisions/Retransmit](#) [View/Update Pay Stub Report](#)

WORK STATUS INFORMATION - Office 522

Work Reviews	
Unit	Pending
CRT	0

[Pending Work Reviews: 0](#)
[Pending Work Reports: 0](#)
[Due Process Sent: 0](#)
[Past Due: 0](#)
[Pending Development: 0](#)
[Overdue: 0](#)

[Completed Cases](#)
[Administrative Utilities...](#)

[Refresh Counts](#)

USER PROFILE

Name: MY NAME
 Office: 522 Unit: CRT [Change User Info/Preferences](#)

eWORK MESSAGES

[Functional Changes Details](#) [Important Information about Using eWork!](#)

Shortcut to javascript:gossn('paystublisting'); Local intranet


[Back](#) Page 11 of 125 [Next](#)

Internet 100%

Your Task:
Prepare form SSA-821.

Step 1:
Assume you have already started eWork.

First select the field into which you must enter the beneficiary's SSN.

 [Show Me How](#)



QuickTime™ and a
TIFF (Uncompressed) decompressor
are needed to see this picture.

- **Client:** Alzheimer's Association
- **Project:** Training and Reference Guide for MAS 500 Financial Accounting System
- **My role:** Instructional designer/developer; UI/interaction designer
- **Tools used:** Captivate, RoboHelp



TRAINING HOME**Getting Started**

Learn about the MAS 500 system and the modules and tools most commonly used by an Alzheimer's Association chapter.

Recommended for new users

GO

Tutorials

Practice performing several accounting tasks in MAS 500 using interactive tutorials that simulate the MAS 500 system.

Recommended for new users

GO

Quick Reference

See detailed steps and learn tips and best practice information for the most commonly-used tasks in MAS 500.

Recommended for both new and experienced users

GO

By completing this training you will learn how to perform the key accounting activities most commonly used by an Alzheimer's Association chapter's finance team. The training complements the MAS 500 Help system, but does not replace it. If you need information about MAS 500 modules not covered by the training, or detailed information about MAS 500 functionality, we encourage you to refer to the regular MAS 500 Help system or your Sage MAS 500 End User Guide.

If you have a question about using MAS 500, and are unable to find the answer in either this Training and Reference or the MAS 500 Help system, please call the National office Help Desk at 877-335-5853 (toll free).

GETTING STARTED



Getting Started Main Page

The Getting Started topics provide an overview of the MAS 500 system and the modules most commonly used by an Alzheimer's Association chapter. Included is an introduction to the FRx Reporting tools and the Alzheimer's Association's account number structure.

Click a topic to learn more:

- [MAS 500 System Overview](#)
- [General Ledger Overview](#)
- [Accounts Payable Overview](#)
- [Accounts Receivable Overview](#)
- [Cash Management Overview](#)
- [FRx Reporting Overview](#)
- [Alzheimer's Association Accounts Structure](#)

alzheimer's association **MAS 500** Training and Reference

GETTING STARTED

MAS 500 System Overview

- [What is MAS 500?](#)
- [The Tasks Menu](#)
- [Task Organization](#)

What is MAS 500?

MAS 500 is an accounting software program (by Sage) that streamlines all of your Alzheimer's Association chapter's accounting functions, with seamless integration between modules (for example, between the General Ledger, Accounts Payable, Accounts Receivable, and Cash Management).

MAS 500 also provides highly flexible reporting options. While you can create standard reports and forms using MAS 500 Reports, the General Ledger module is integrated with the FRx financial reporting program which you can use to create complex or customized reports.

The MAS 500 program uses a single database to store financial information such as general journal entries and invoices and system data such as company information and security settings.

The Tasks Menu

Let's begin by looking at the MAS 500 system's Tasks menu. The Tasks menu contains all the **modules** you will need to maintain and process the financial data for your Alzheimer's Association chapter. The Tasks menu is located on the left side of the MAS 500 interface (see Figure B). The

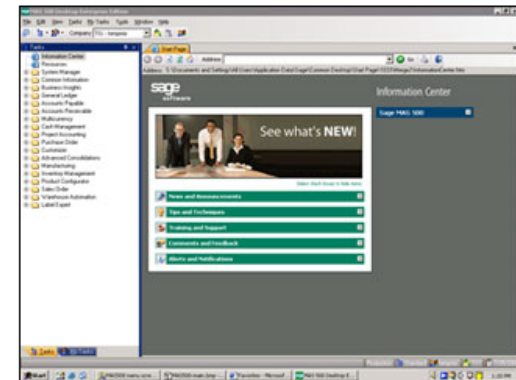


Figure A. The MAS 500 main screen.

TUTORIALS



Tutorials Main Page

These interactive tutorials allow you to practice common Alzheimer's Association accounting activities in a simulated version of MAS 500.

[Tutorial #1: How to create and post a voucher](#)

In this tutorial you will learn how to create a voucher for a vendor's invoice, and then post that voucher to the system. If you wish to review the steps for this task before using the tutorial, see the Quick Reference Topic "[How to enter a voucher/invoice.](#)"

[Tutorial #2: How to select an invoice and print a check](#)

In this tutorial you will learn how to select a vendor's invoice for payment and then print a check to pay that invoice. If you wish to review the steps for these tasks before using the tutorial, see the Quick Reference Topics "[How to select invoices for payment](#)" and "[How to print checks.](#)"

[Tutorial #3: How to apply a manual check](#)

In this tutorial you will learn how to process a handwritten, manual check used in "emergency" or other situations where there is not time (or knowledgeable staff) to process a check using the MAS 500 system. If you wish to review the steps for this task before using the tutorial, see the Quick Reference Topic "[How to apply a manual check.](#)"

- Getting Started
- Tutorials
 - Tutorials Main Page
 - How to create and post a voucher
 - How to select an invoice and print
 - How to apply a manual check
 - Quick Reference

Tutorial: How to create and post a voucher

Tutorial Instructions



Read the scenario below. When you are ready to begin, click the **Start Tutorial** button. Follow the instructions on each screen to complete the tutorial. If for some reason you need to back up or skip forward, use the control bar at the bottom of the screen.

Scenario

Your chapter has received an invoice from A. Aardvark Self Storage for off-site storage fees:

*Invoice no.: 102
Date: August 1, 2006
Amount: \$250*

Your goal is to create and post a voucher for this invoice using the MAS 500 system. You can accomplish this goal by using the Process Vouchers task in Accounts Payable.

[Start Tutorial](#) [Click twice if necessary.]



- Training Home
- Getting Started
- Tutorials
- Quick Reference

Tutorial: How to create and post a voucher

sage MAS 500 Desktop Enterprise Edition

File Edit View Tasks My Tasks Tools Window Help

sage Enter Vouchers [Batch: APVO-0000033]

Tasks

Type Voucher

Header Detail Totals Amt \$0.00

Vendor

Remit To Remit To Address...

Purchase From Purchase Address...

Contact Class 1099...

Invoice

Invoice Date 07/24/2006 Bank Account

Receipt Date 07/24/2006 Separate Check

Reason Hold Payment

Comment

Shipping

Ship Via

F.O.B.

Terms

Payment Terms

Due Date 07/24/2006

Discount Date 07/24/2006

tempmis TS1 7/24/2006

tempmis TS1 7/24/2006

Information

Status: In Use

Select Recurring...

Enter Vouchers...

Register/Post...

The Enter Vouchers window opens. You will create the new voucher in this window. First you must create a new voucher number (in the same way that you created a new batch number earlier).

Click the **Next Number (#)** button.

Show Hint



QUICK REFERENCE



Quick Reference Main Page

The Quick Reference topics include detailed instructions, helpful tips, and "best practice" information for completing the most commonly-used activities in MAS 500 and FRx. You might find it useful to print a topic so you can refer to it while using the MAS 500 system.

Click an activity below to view its Quick Reference topic.

General Ledger

- [How to set up a new GL account](#)
- [How to enter and post a journal entry](#)
- [How to set up a recurring journal entry](#)
- [How to retrieve a recurring journal entry](#)
- [How to import a budget](#)
- [How to complete GL period end processing](#)

Accounts Payable

- [How to set up a new vendor](#)
- [How to enter a voucher/invoice](#)
- [How to reverse a posted voucher](#)
- [How to select invoices for payment](#)
- [How to print checks](#)
- [How to use the "quick print" feature to print a check](#)
- [How to apply a manual check](#)
- [How to reverse/void a check](#)
- [How to apply payments and memos to invoices](#)
- [How to complete AP period end processing](#)

- Getting Started
- Tutorials
- Quick Reference
 - Quick Reference Main Page
 - General Ledger
 - Accounts Payable
 - How to set up a new vendor
 - How to enter a voucher/invoice
 - How to reverse a posted vouc
 - How to select invoices for paym
 - How to print checks
 - How to use the "quick print" fea
 - How to apply a manual check
 - How to reverse/void a check
 - How to apply payments and me
 - How to complete AP period end
 - Accounts Receivable
 - Cash Management
 - FRx Reporting

QUICK REFERENCE



How to set up a new vendor

This quick reference topic describes how to set up a new vendor profile in MAS 500.

Business Scenario

Your chapter has received an invoice from a vendor, XYZ Company, but the vendor does not exist in your MAS 500 database. You must create a new vendor profile for XYZ Company.

Key



= Tip



= Best practice



If you have not yet defined your vendor classes (e.g., "Trade," "Employee"), do so before setting up a new vendor. (Use Maintain Vendor Classes in the AP Maintenance menu.)

Steps

Click the expand/collapse buttons below (+/-) to show/hide detailed procedures for each step. If you want to print the entire topic, you must expand all the steps first.

1. Open the **Maintain Vendors** window. +/-
2. Enter the vendor's main information. +/-
3. Enter the vendor's default account information. +/-
4. Save and close the **Maintain Vendors** window. +/-

- Getting Started
- Tutorials
- Quick Reference
 - Quick Reference Main Page
 - General Ledger
 - Accounts Payable
 - How to set up a new vendor
 - How to enter a voucher/invoice
 - How to reverse a posted voucher
 - How to select invoices for payment
 - How to print checks
 - How to use the "quick print" feature
 - How to apply a manual check
 - How to reverse/void a check
 - How to apply payments and make adjustments
 - How to complete AP period end
 - Accounts Receivable
 - Cash Management
 - FRx Reporting

QUICK REFERENCE



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Key



= Tip



= Best practice

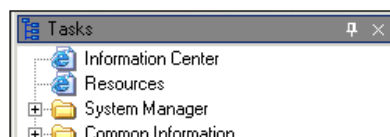


If you have not yet defined your vendor classes (e.g., "Trade," "Employee"), do so before setting up a new vendor. (Use Maintain Vendor Classes in the AP Maintenance menu.)

Steps

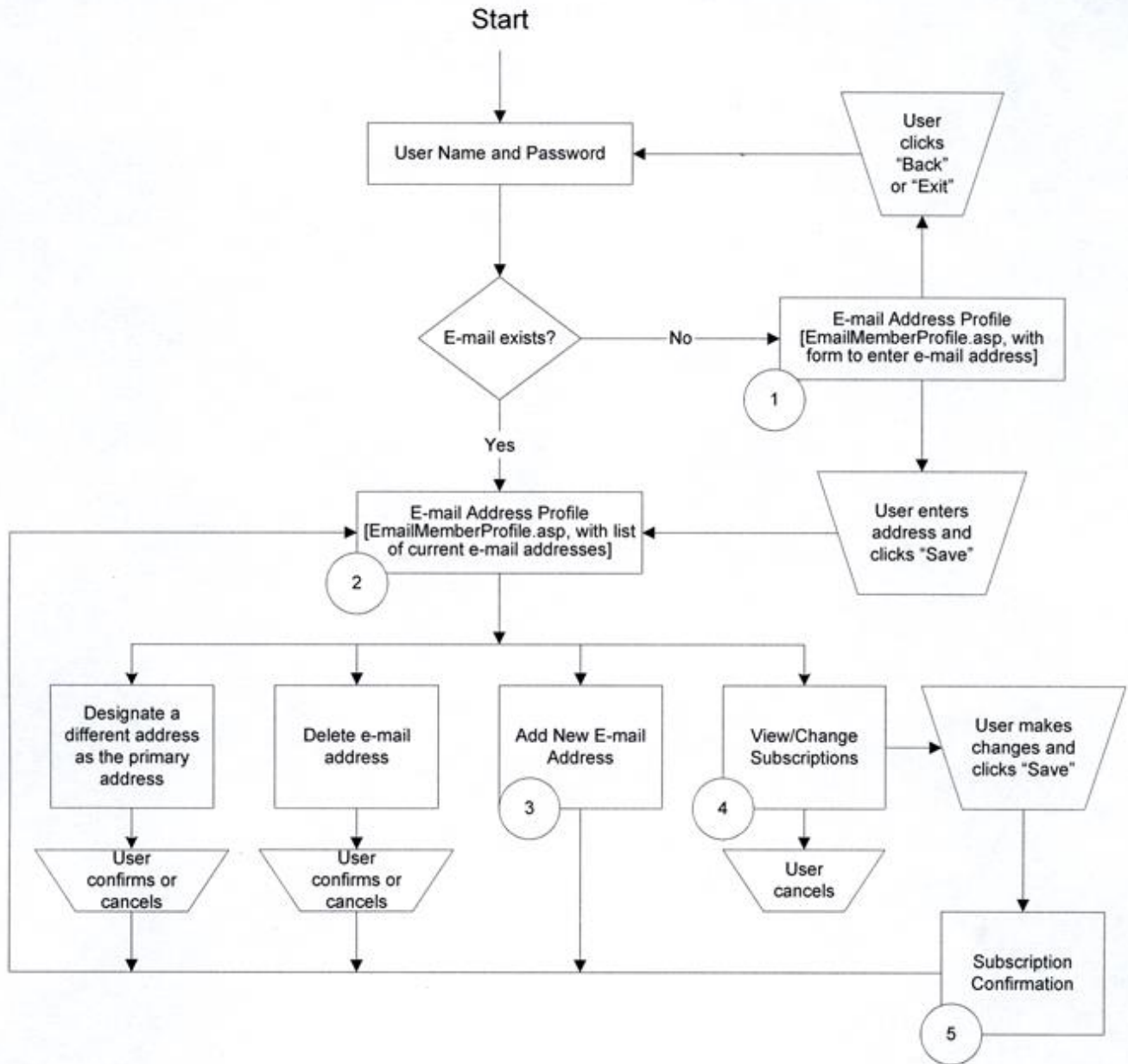
Click the expand/collapse buttons below (+/-) to show/hide detailed procedures for each step. If you want to print the entire topic, you must expand all the steps first.

1. Open the **Maintain Vendors** window. +/-
 - a. Open the **Accounts Payable** folder (in the MAS 500 Tasks menu)
 - b. Open the **Maintenance** folder.
 - c. Double click **Maintain Vendors**.





- **Client (my employer):** Rotary International
- **Projects:** Web-based e-mail subscription manager and job application Web site
- **My role:** information architect; UI/interaction designer; content writer (in the course of my duties as Web Content Supervisor)
- **Tools used:** Visio, PowerPoint



Rotary International - Microsoft Internet Explorer provided by Rotary International

File Edit View Favorites Tools Help

Address http://www.rotary.org/

Rotary International
A Global Network of Community Volunteers

About Rotary Membership The Rotary Foundation RI Programs Newsroom Events Club-District Support Training Downloads Member Access

Come here from Member Access menu page.
Current account with two or more email addresses on record.
Also shows at least one subscription option chosen.

E-mail Subscriptions Profile

E-mail Subscriptions Profile for Margaret Smith
(Membership ID: 9999999)

Here are the e-mail addresses you have registered with Rotary:

Primary address:

margaret@user-domain.com [Delete](#)

Other addresses:

margaret@domain.com [Make Primary](#) [Delete](#)

maggie@domain.com [Make Primary](#) [Delete](#)

You will receive the following e-mail subscription(s) at your primary address:

- General Rotary e-mail correspondence
- Correspondence from the RI President

[Change Subscriptions](#) [Add new e-mail address](#)

What is a primary e-mail address?

If you have more than one e-mail address registered with Rotary, only your primary address receives subscriptions. You may change your primary address by clicking the "Make Primary" button next to another address.

What is an email subscription?

An e-mail subscription is a service that allows you to receive periodic e-mails at your e-mail address. You may sign up for several different Rotary e-mail subscription options by [...]



[logo] Rotary International *Careers*

[navigation:] Welcome | About Rotary | FAQ | Feedback

Welcome to Rotary International Careers

[Welcome text]

- > Apply online now [external link]
[Explanatory text]
- > Learn more about Rotary [link to About Rotary page]
- > Visit the official Rotary Web site [external link]

[people image]

Privacy [link] | Copyright 2003–2005 Rotary International [link]



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Please make sure to have an electronic version of your resume ready before applying online. Remember to be as thorough as possible when completing your online application. The more information you provide on the online application, the easier it will be for our recruitment specialists to match your skills, experience, and fields of interest with current job opportunities. If you are selected for an interview, you will be asked to sign a copy of your online application as additional verification of your information.

Thank you for your interest in employment opportunities at Rotary International. Please note that many Rotary staff will be on assignment related to the Rotary International 100 years convention from 13 June through 24 June. For that reason, there may be delays in responding to your application.

→ [Apply online now](#)

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We recommend that you use Internet Explorer 5.5 or above and have your cookies enabled within the browser.



QuickTime™ and a
TIFF (Uncompressed) decompressor
are needed to see this picture.

- **Client (my employer):** Career Education (AIU Online)
- **Project:** “Case Brief Tutorial” Flash activity for paralegal course
- **My role:** Instructional designer/developer; UI/interaction designer
- **Tools used:** PowerPoint



This tutorial launches from GLS LS100_u5cs_15

Note to media developer: This is a new use for the large I-frame player (non-software simulation).

SCREEN 1

Refer to supplemental files for text and graphics as needed.

Graphics for entire tutorial: technicolor-brief-master-graphics.psd.

Note: all the document text is available in the .psd file, but the source files are indicated on every slide if you need them.

Source files for docs in this illustration:
Step 1: "generic case 1-black.doc"
Step 2: "generic case 2-colored.doc"
Step 3: "generic-brief.doc"

No interactivity.
Student clicks forward arrow to continue.

Step 1. Read and analyze the case

Step 2. Color-code sections that correspond to brief components:

- Procedural History (Red)
- Facts (Green)
- Issue(s) (Blue)
- Rationale (Orange)
- Holding (Black)

Step 3. Write the case brief based on the color-coded sections

This illustration shows the basic steps for briefing a case using the "Technicolor Briefing" (color-coding) method. "Technicolor Briefing" was developed at the University of Denver College of Law by the late Professor Thompson Marsh. While color-coding a case is not required, the technique can help you organize the content of your brief.

Click the forward arrow to begin.

Reference:
Bateman, P. (1999). *Ten instructions for briefing cases*. Retrieved July 19, 2004, from Southwestern University School of Law, Los Angeles Web site: <http://www.swlaw.edu/download/briefingcases.pdf>



Programming notes

SCREEN 2

On left side, display court case opinion document (file "doc1-uncolored case.doc") on simulated paper document with color key above. See supplemental files for case text.

General specs:

Document text must fit entirely within the simulated page (no scrolling). Leave sufficient white space around margins to accommodate the color key, buttons, and instruction box. Follow the source documents for type style (plain paragraphs, bold headers). 11 pt size may be necessary to make it all fit.

Interactivity: Student should be able to change the color of any paragraph by highlighting the paragraph with the cursor, then clicking a color chip.

"See Model Answer" button AND forward arrow button should be inactive until student uses at least one color. Both buttons will advance to the next screen.

Procedural History **Rationale**
Facts **Holding**
Issue(s)

Willis vs. Lowell, 549 So. 2d 388 (Fla. 4th DCA 1984)

DAVIS, Judge

This is an appeal from a decision of the county court for the 17th Judicial District court granting the defendant's motion to dismiss. For the reasons stated herein we AFFIRM.

On March 23, 1980, Willis was driving his automobile in a southbound direction on Interstate 95 near the Hollywood Blvd. exit. As Willis approached the exit, his vehicle was struck from behind by an automobile driven by Lowell. Both automobiles sustained substantial damage and Willis was hospitalized with minor personal injuries. Lowell was cited by the Florida Highway Patrol for failing to maintain a safe distance from Willis' automobile.

On April 2 1984, Willis filed his complaint with the county court alleging Lowell's negligence in failing to maintain a safe distance between the two automobiles. Lowell responded to the complaint by filing a motion to dismiss the complaint on grounds that the applicable statute of limitations barred Willis' complaint. The trial court entertained oral argument from the parties and thereafter granted Lowell's motion to dismiss.

The issue presented by Willis' appeal is whether the trial court's dismissal of his complaint was proper under the facts of this case.

Under Florida law, an action based upon a negligence theory must be commenced within 4 years from the date of injury giving rise to plaintiff's claim against the defendant. F.S.A. § 95.11(3)(a). As Willis' complaint was filed four years and 9 days after the statutorily prescribed time for filing negligence actions, the action of the lower court in dismissing plaintiff's complaint was not erroneous.

AFFIRMED.

On this screen you can complete the first two steps of briefing:

1. Read and analyze the case on the left.
2. Use the "technicolor briefing" technique to facilitate your analysis. This technique simply involves color-coding the sections of text in the case document that correspond to the essential components of a brief: (1) procedural history, (2) facts, (3) holding, (4) issue(s), and (5) rationale.

To color-code text, highlight the portion you wish to colorize; then click the color chip at the top of the screen (much like using the Font Color tool in a word processor).

When you are done, click **"See Model Answer"** to compare your work to an expert's work.

See Model Answer

BACK



Programming notes

SCREEN 3

Display model colored case on right. (File "doc2-colored case.doc")

Interactivity: Student may roll cursor over any of the model answer paragraphs to trigger an informative popup box. (see next slide)

The student clicks the forward arrow to continue.

Transition to next screen: when student clicks the forward arrow, use a 2 or 3 frame animation to show that the document on the right gets shifted over to the left to make room for the new document on the right. The documents on the left side could possibly be stacked as they accumulate, with tabs for all docs: "Original Case" and "Your Color-Coded Case" at this point. (see sample on later slide)

The screenshot shows a multimedia player window titled "Multimedia Player - Mic". On the left, there is a legend with three colored squares: a red square for "Procedural History", a green square for "Facts", and a blue square for "Issue(s)". The main content area is split into two panels. The left panel shows a document titled "Willis vs. Lowell, 549 So. 2d 388 (Fla. 4th DCA 1984)" by Judge DAVIS. The text is color-coded: "Procedural History" is red, "Facts" is green, and "Issue(s)" is blue. The right panel shows the same document with a model answer overlaid, where the text is color-coded to match the original document's structure. A light blue popup box at the top right contains the text: "A model answer is on the right. How does it compare to yours? Roll your cursor over each paragraph in the model answer to learn more. The next step is to create the brief. Click the forward arrow when you are ready." At the bottom right of the player, there is a "BACK" button with a left-pointing arrow.



Programming History notes

(continued from previous)

These are the popups that appear when student rolls over a paragraph. When student rolls over a paragraph, a highlight frame should appear around that paragraph. The popup should appear on the left.

(They should appear one at a time; I just put them all here to save space.)

A model answer is on the right. How does it compare to yours? Roll your cursor over each paragraph in the model answer to learn more. The next step is to create the brief. Click the forward arrow when you are ready.

Procedural History
Facts
Holding

This section is part of the procedural history of the case. It tells what happened in the case after it was filed.

DAVIS, Judge

These are the facts of the case. They describe what happened between the parties that led to the filing of the lawsuit.

On March 23, 1980, Willis was driving his automobile in a

This section is another part of procedural history of the case. It describes what the lower court did in resolving the defendant's motion to dismiss plaintiff's complaint.

This sentence addresses the issue that the appellate court is asked to resolve in the appeal.

Lowell's motion to dismiss

This section represents the "rationale" of the court. The rationale is the portion of the case where the court explains the legal basis for its decision. Here, the legal basis for the court's decision is Florida's statute of limitations for negligence actions.

court in dismissing plaintiff's complaint was not erroneous.

This single word represents the court's decision, or - the holding of the case.

Willis vs. Lowell, 549 So. 2d 388 (Fla. 4th DCA 1984)

DAVIS, Judge

This is an appeal from a decision of the county court for the 17th Judicial District court granting the defendant's motion to dismiss. For the reasons stated herein we AFFIRM.

On March 23, 1980, Willis was driving his automobile in a southbound direction on Interstate 95 near the Hollywood Blvd. exit. As Willis approached the exit, his vehicle was struck from behind by an automobile driven by Lowell. Both automobiles sustained substantial damage and Willis was hospitalized with minor personal injuries. Lowell was cited by the Florida Highway Patrol for failing to maintain a safe distance from Willis' automobile.

On April 2 1984, Willis filed his complaint with the county court alleging Lowell's negligence in failing to maintain a safe distance between the two automobiles. Lowell responded to the complaint by filing a motion to dismiss the complaint on grounds that the applicable statute of limitations barred Willis' complaint. The trial court entertained oral argument from the parties and thereafter granted Lowell's motion to dismiss.

The issue presented by Willis' appeal is whether the trial court's dismissal of his complaint was proper under the facts of this case.

Under Florida law, an action based upon a negligence theory must be commenced within 4 years from the date of injury giving rise to plaintiff's claim against the defendant. F.S.A. § 95.11(3)(a). As Willis' complaint was filed four years and 9 days after the statutorily prescribed time for filing negligence actions, the action of the lower court in dismissing plaintiff's complaint was not erroneous.

AFFIRMED.

BACK



Programming notes

SCREEN 4

Model color case has now shifted to the left side. A case brief template appears on the right.

Student should be able to type into the areas on the right as indicated by the gray boxes. Student should also be able to copy and paste text from the document on the left to the template on the right. Each box should become scrollable if the content exceeds the box size.

The forward arrow should be inactive until at least one character has been typed or pasted into the template on the left.

Transition to next screen: when student clicks the forward arrow, use a 2 or 3 frame animation to show that the document on the right gets shifted over to the left to make room for the new document on the right. The documents on the left side could possibly be stacked as they accumulate, with labeled tabs for all docs. (see next slide for example)

The screenshot shows a multimedia player window titled "Multimedia Player - Microsoft Internet Explorer". The interface is divided into two main sections. On the left, there is a legend with five color-coded boxes: red for "Procedural History", green for "Facts", blue for "Issue(s)", yellow for "Rationale", and black for "Holding". Below the legend, a case document is displayed. The document title is "Willis vs. Lowell, 549 So. 2d 388 (Fla. 4th DCA 1984)" and the judge is "DAVIS, Judge". The text is color-coded according to the legend: red for procedural history, green for facts, blue for issues, yellow for rationale, and black for holding. The text reads: "This is an appeal from a decision of the county court for the 17th Judicial District court granting the defendant's motion to dismiss. For the reasons stated herein we AFFIRM." "On March 23, 1980, Willis was driving his automobile in a southbound direction on Interstate 95 near the Hollywood Blvd. exit. As Willis approached the exit, his vehicle was struck from behind by an automobile driven by Lowell. Both automobiles sustained substantial damage and Willis was hospitalized with minor personal injuries. Lowell was cited by the Florida Highway Patrol for failing to maintain a safe distance from Willis' automobile." "On April 2 1984, Willis filed his complaint with the county court alleging Lowell's negligence in failing to maintain a safe distance between the two automobiles. Lowell responded to the complaint by filing a motion to dismiss the complaint on grounds that the applicable statute of limitations barred Willis' complaint. The trial court entertained oral argument from the parties and thereafter granted Lowell's motion to dismiss." "The issue presented by Willis' appeal is whether the trial court's dismissal of his complaint was proper under the facts of this case." "Under Florida law, an action based upon a negligence theory must be commenced within 4 years from the date of injury giving rise to plaintiff's claim against the defendant. F.S.A. § 95.11(3)(a). As Willis' complaint was filed four years and 9 days after the statutorily prescribed time for filing negligence actions, the action of the lower court in dismissing plaintiff's complaint was not erroneous." "AFFIRMED." On the right side of the player, there is a "Case Brief for" template with five labeled input boxes: "Facts", "Procedural History", "Issues", "Holding", and "Rationale". A blue arrow points from the case document to the template. A "BACK" button is visible in the bottom right corner of the player window.

Using the color-coded case as a guide, write the case brief using the template on the right. You may copy and paste as needed, but remember to rewrite the material for brevity. When you are done, click the forward arrow to compare your brief to an expert's brief.



Programming notes

SCREEN 5

Expert's case brief appears on right (file: "case brief-expert.doc").

Student should be able to roll over each paragraph to see an informative popup (see next slide for popup content).

Note: replace tab label "Original Case" with "Color-Coded Case"

Multimedia Player - Microsoft Internet Explorer

Original Case Your Case Brief Expert Case Brief

Case Brief for

Case name... blah blah blah [student created]

Facts

blah blah blah [student created]

Procedural History

blah blah blah [student created]

Issues

blah blah blah [student created]

Holding

blah blah blah [student created]

Rationale

blah blah blah [student created]

Case Brief for

Willis vs. Lowell, 549 So. 2d 388 (Fla. 4th DCA 1984)

Facts

Lowell's automobile struck Willis' automobile in a March 23, 1980 collision which damaged both cars and injured Willis. Lowell was cited for failing to maintain a safe distance from Willis' automobile.

Procedural History

On April 2, 1984, Willis sued Lowell in county court alleging negligence. Lowell filed a motion to dismiss the complaint on grounds that the statute of limitations barred Willis' complaint. The court granted Lowell's motion to dismiss.

Issues

Did the county court err in dismissing the plaintiff's complaint?

Holding

No. The action of the county court was affirmed.

Rationale

Under Florida law, an action based upon a negligence theory must be commenced within 4 years from the date of injury giving rise to plaintiff's claim against the defendant. F.S.A. § 95.11(3)(a). As Willis' complaint was filed four years and 9 days after the statutorily prescribed time for filing negligence actions, the action of the lower court in dismissing plaintiff's complaint was proper.

BACK



Programming notes

(continued from previous)

These are the popups that appear when student rolls over a paragraph. When student rolls over a paragraph, a highlight frame should appear around that paragraph. The popup should appear on the left.

(they should appear one at a time; I just put them all here to save space).

Note: replace tab label "Original Case" with "Color-Coded Case"

The screenshot shows a window titled "Multimedia Player - Microsoft Internet Explorer". At the top, there are two tabs: "Original Case" and "Your Case Brief". A light blue tooltip box at the top right contains the text: "How does your brief compare to the expert's brief? Roll your cursor over each paragraph in the expert's brief to learn more. Click the forward arrow when you are done." Below the tabs, the "Original Case" tab is active, displaying a case brief for "Willis vs. Lowell, 549 So. 2d 388 (Fla. 4th DCA 1984)". The brief is divided into sections: Facts, Procedural History, Issues, Holding, and Rationale. To the left of the brief, several white popups with black borders provide additional information about each section. Lines connect these popups to the corresponding sections in the brief. At the bottom right of the player, there is a "BACK" button with a left-pointing arrow.

Original Case **Your Case Brief**

Facts. Notice how the facts from the case have been summarized for brevity's sake. Some details from the description of the automobile crash, such as street names, have been omitted because they are not essential to illustrate the legal issues.

Procedural History. As with the facts, the procedural history has been condensed to convey only the critical events and decisions.

Issues. The issue typically is phrased as a question. Also, note that the issue question asks whether the court "erred" rather than whether it "acted properly." The "erred" wording is preferred because appellate courts review the record from the lower courts to determine if legal "error" has occurred and, if so, whether the error deprived one of the parties to a fair trial.

Rationale

Holding. The holding is usually expressed as either "Yes" or "No" because it must answer the legal question posed by the issue. The sentence that follows is accurate but not necessary because it is part of the procedural history.

Rationale. The rationale does not differ much from the original case's language because the language itself comes primarily from the law that relates to the case, and so it is desirable to retain the legal wording for accuracy's sake.

Case Brief for
Willis vs. Lowell, 549 So. 2d 388 (Fla. 4th DCA 1984)

Facts
Lowell's automobile struck Willis' automobile in a March 23, 1980 collision which damaged both cars and injured Willis. Lowell was cited for failing to maintain a safe distance from Willis' automobile.

Procedural History
On April 2, 1984, Willis sued Lowell in county court alleging negligence. Lowell filed a motion to dismiss the complaint on grounds that the statute of limitations barred Willis' complaint. The court granted Lowell's motion to dismiss.

Issues
Did the county court err in dismissing the plaintiff's complaint?

Holding
No. The action of the county court was affirmed.

Rationale
Under Florida law, an action based upon a negligence theory must be commenced within 4 years from the date of injury giving rise to plaintiff's claim against the defendant. F.S.A. § 95.11(3)(a). As Willis' complaint was filed four years and 9 days after the statutorily prescribed time for filing negligence actions, the action of the lower court in dismissing plaintiff's complaint was proper.

BACK





- **Client (my employer):** UNext (Cardean University)
- **Project:** Financial Accounting course (Web-based)
- **My role:** Instructional designer/developer
- **Tools used:** PowerPoint



Course

Index

- Orientation
- Welcome
- Project Scenario
- Getting Started
- Task 1
- About this Course
- Task 2
- Task 3
- Task 4

In association with



**COLUMBIA
BUSINESS
SCHOOL**

**Welcome to Financial Accounting:
Assessing the Quality of Accounting Information**



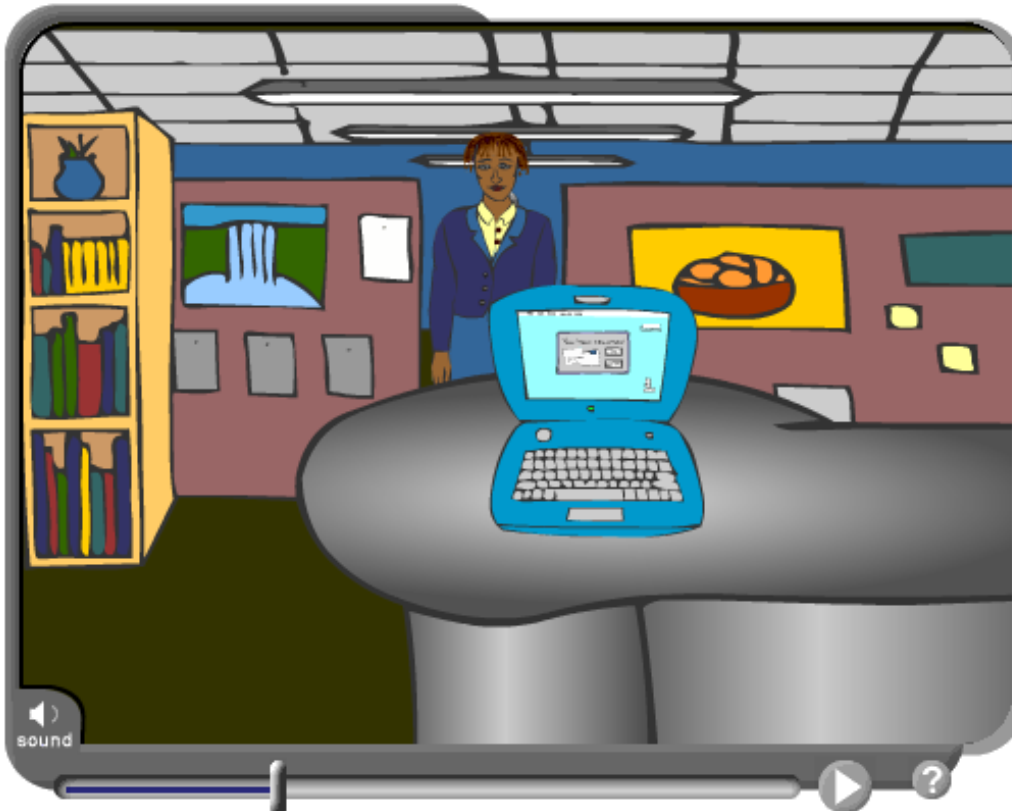
To begin this course, select "Getting Started."

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- tools
- discuss
- send work
- help
- print
- back



Animation



SCENE: MODERN OFFICE CUBICLE, DAY

You are sitting at your desk in a large office cubicle. Your laptop computer is on the desk.


NARRATOR

You are a junior accountant for Surftek, a PC manufacturer. Surftek is planning an aggressive launch of new product lines in the coming months. As part of that effort, Surftek is considering a strategic alliance with Red Desert. Red Desert manufactures dependable and inexpensive motherboards for personal computers.

CUT TO a close up of your laptop. You're looking at the web site for Red Desert Industries. On the web site a promotional movie exclaims "Your old motherboard is clunky and too slow. Red Desert motherboards are flashy,

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Netscape: Cardean Course



CARDEAN UNIVERSITY

Course Index

Orientation Task 1 Description

Project Scenario Ethical Issues

Task 1

Task 2 Articulation of Financial Statements


Task 3 Articulation of Accounts

Task 4

tools
 discuss
 send work
 help
 print
 back

Task 1

Review MiniScribe Case



Your boss, Cheryl Thompson, has asked you to assess the quality of Red Desert's accounting information. However, Cheryl thinks some background information would be helpful. To give you an idea of what types of unusual items you should be looking for, she suggests that you read about an actual fraud case—MiniScribe.

MiniScribe is a good case to review because it illustrates how a company's activities affect its financial statements. It also illustrates how difficult it is to detect fraud or other irregular activities. The information you gather from the MiniScribe case is for your own records. It might help you later when you turn your attention to Red Desert.

Deliverable

Prepare a two-page report that lists issues and notable events regarding MiniScribe's fraudulent activities. Describe concisely what happened and how it affected the financial statements and specific accounts. The report does not have to be a formal document, just a well-organized list.

When you complete this report, click the "Send

Orientation

Task 2
Description

Project Scenario

Accounting
Errors and
Irregularities

Task 1

Common-size
and Percentage-
change Financial
Statements
Ratio Analysis
Overview

Task 2

Task 3

Types of
Ratios

Task 4

Common
Ratios

Accounting Errors and Irregularities

Summary

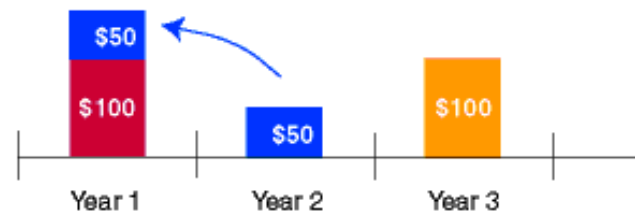
the appropriate and inappropriate exercise of this responsibility is difficult to ascertain in many cases.

Reversal of Errors

A few points should be made about errors and fraudulent financial reporting. Most errors are inadvertent timing errors that often reverse themselves in the next period. Suppose that sales for merchandise that would normally occur in the Year 2 accounting period are improperly recorded earlier, at the end of Year 1. This is easily shown in a numerical example. Suppose actual sales were \$100 in Year 1 and \$100 in Year 2.



Now, suppose \$50 of Year 2 sales were improperly recognized in Year 1.



The financial statements for Year 1 would show sales of



Hear Professor Kirschenheiter explain how reversal of errors works.

Play [video with transcript](#) (1:05).

View [transcript only](#).



Does reversal of errors also apply to expenses? Hear Professor Kirschenheiter explain.

Play [video with transcript](#) (0:27).

View [transcript only](#).

Instructions

In this interactive exercise you will complete pro forma financial statements for the fictitious restaurant chain Piping Patty's.

In the first part of the exercise you will create the first year of pro forma financial statements for Piping Patty's by matching the correct business drivers to the appropriate accounts following the sequence of steps described earlier in this course.

A list of the company's business drivers (1) will be provided for you (in alphabetical order), as well as a set of blank financial statements. Simply drag and drop the driver(s) from the list to the box(es) under the appropriate accounts in the financial statements (2).

The dollar amounts will be calculated for you automatically. If you want to see the spreadsheet formulas for any of these calculations, roll your mouse cursor over the number (3).

In the second part of the exercise you will answer questions about the pro forma statements.

Click "Continue" to start.

Step 2: Forecast Operating Expenses for Year 1
Drag and drop the appropriate drivers to the relevant Income Statement accounts.

Piping Patty's Drivers		Piping Patty's Pro Forma Financial Statements			
		Balance Sheet	Income Statement	Statement of Cash Flows	Statement of Shareholder's Equity
•Driver driver driver driver driver driver			Driver?		
•Driver driver driver driver driver driver			Driver?		
•Driver driver driver driver driver driver			Driver?		
•Driver driver driver driver driver driver			Driver?		
•Driver driver driver driver driver driver			Driver?		
•Driver driver driver driver driver driver			Driver?		
•Driver driver driver driver driver driver			Driver?		
•Driver driver driver driver driver driver			Driver?		
•Driver driver driver driver driver driver			Driver?		

Year 1

Gross Margin	2,000,000
Driver?	
Driver?	
Driver?	
Driver?	
Driver?	
Driver?	

Instructions Next >>

Gross Margin = Sales - COGS

Gross Margin	2,000,000
------------------------	-----------

Continue



Step 7: Calculate Income Tax Expense for Year 1

Drag and drop the appropriate drivers to the relevant Income Statement accounts.

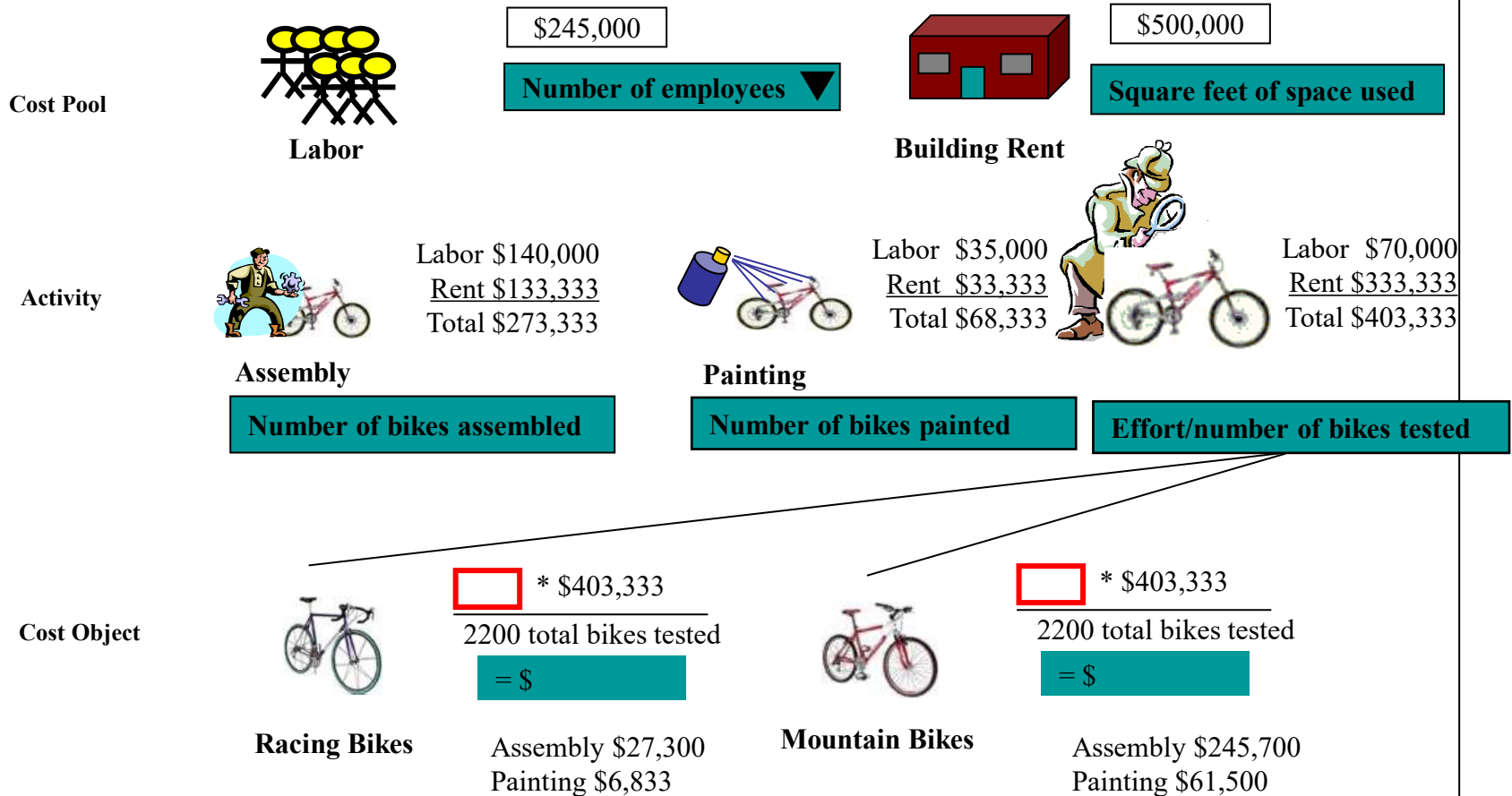
Piping Patty's Drivers	Piping Patty's Pro Forma Financial Statements																									
	Balance Sheet	Income Statement	Statement of Cash Flows	Statement of Shareholder's Equity																						
<ul style="list-style-type: none"> •Driver driver driver driver driver driver •Driver driver driver driver driver driver •Driver driver driver driver driver driver •Driver driver driver driver driver driver •Driver driver driver driver driver driver •Driver driver driver driver driver driver •Driver driver driver driver driver driver •Driver driver driver driver driver driver 				<p>Year 1</p> <table> <tr> <td>Sales.....</td> <td>\$ 30,000,000</td> </tr> <tr> <td>Cost of Goods Sold.....</td> <td>(15,000,000)</td> </tr> <tr> <td>Gross Margin.....</td> <td>15,000,000</td> </tr> <tr> <td>Restaurant Operating Expenses.....</td> <td>(3,000,000)</td> </tr> <tr> <td>General and Administrative Expenses.....</td> <td>(1,500,000)</td> </tr> <tr> <td>Depreciation Expense.....</td> <td>(6,000,000)</td> </tr> <tr> <td><i>Income from Continuing Operations</i>.....</td> <td>4,500,000</td> </tr> <tr> <td>Interest Expense.....</td> <td>(1,125,000)</td> </tr> <tr> <td>Income before Taxes.....</td> <td>3,375,000</td> </tr> <tr> <td>Income Tax Expense.....</td> <td></td> </tr> <tr> <td>Net Income.....</td> <td></td> </tr> </table>	Sales.....	\$ 30,000,000	Cost of Goods Sold.....	(15,000,000)	Gross Margin.....	15,000,000	Restaurant Operating Expenses.....	(3,000,000)	General and Administrative Expenses.....	(1,500,000)	Depreciation Expense.....	(6,000,000)	<i>Income from Continuing Operations</i>	4,500,000	Interest Expense.....	(1,125,000)	Income before Taxes.....	3,375,000	Income Tax Expense.....		Net Income.....	
Sales.....	\$ 30,000,000																									
Cost of Goods Sold.....	(15,000,000)																									
Gross Margin.....	15,000,000																									
Restaurant Operating Expenses.....	(3,000,000)																									
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Interest Expense.....	(1,125,000)																									
Income before Taxes.....	3,375,000																									
Income Tax Expense.....																										
Net Income.....																										
		<div style="border: 1px solid gray; padding: 2px;"> <ul style="list-style-type: none"> • Interest on Long-Term Debt is 7.5% per year </div>																								
		<div style="border: 2px solid orange; padding: 2px; display: inline-block;"> Driver? </div>																								

Instructions

<<Back Next>>



Enter the number of Racing bikes and Mountain bikes tested.



To calculate the profit margins, enter the number of units, indirect costs, and direct costs for both types of bikes (this information is found on the general ledger).

Racing Bikes



Assembly \$27,300
 Painting \$6,833
Testing \$73,333
Total \$107,466

Number of units

Indirect cost per unit

Direct cost per unit

Price per unit \$1,500

Profit per unit

Profit margin percentage

Mountain Bikes



Assembly \$245,700
 Painting \$61,500
Testing \$330,000
Total \$637,200

Number of units

Indirect cost per unit

Direct cost per unit

Price per unit \$1,000

Profit per unit

Profit margin percentage

Enter the number of labor hours for each department: assembly, painting, and testing. Click "Calculate" to total the labor costs for all three activities.

Cost Pool



Cost: \$245,000

Labor

Driver: Number of labor hours



Cost: \$500,000

Building rent

Driver: Square feet used

Activity



* \$245,000

14,000 total labor hours

Assembly

= \$



* \$245,000

14,000 total labor hours

Painting

= \$



* \$245,000

14,000 total labor hours

Testing

= \$

Cost Object



Racing bikes



Mountain bikes

Calculate

1

2

3

4

5

6

7

8

9





- **Client:** ACCO Brands
- **Project:** PowerPoint Tutorial/Sales Support CD-ROM
 - Teaches sales representatives how to create and print ACCO product flyers with PowerPoint
 - Features software simulations and audio guide
 - CD-ROM includes clip art for hundreds of products
- **My role:** Instructional designer/writer
- **Tools used:** MS Word for storyboard (developed in Director)



NARRATION**Narrator:**

Now it's time to replace the pictures. There are two types of pictures on each template: product pictures, or "line art," and brand name logos. First you'll replace the old line art with the line art for the new product. Click on the pictures you want to change, then press the Backspace or Delete key.

SCREEN COPY [lower frame]**Header:**

Insert a Picture Step 1: Delete

Box:

- Click on the picture(s) you want to replace
- Press the Backspace or Delete key

SCREEN # 15**ANIMATION:**

Screen grabs ["Special Price" template→click on picture of disc caddies→picture disappears]

STATUS MENU:

Identify and Open a Template

Revise the Text

Identify and Insert a Picture

1. Delete

2. Insert

3. Look in

4. Folder

5. File Name

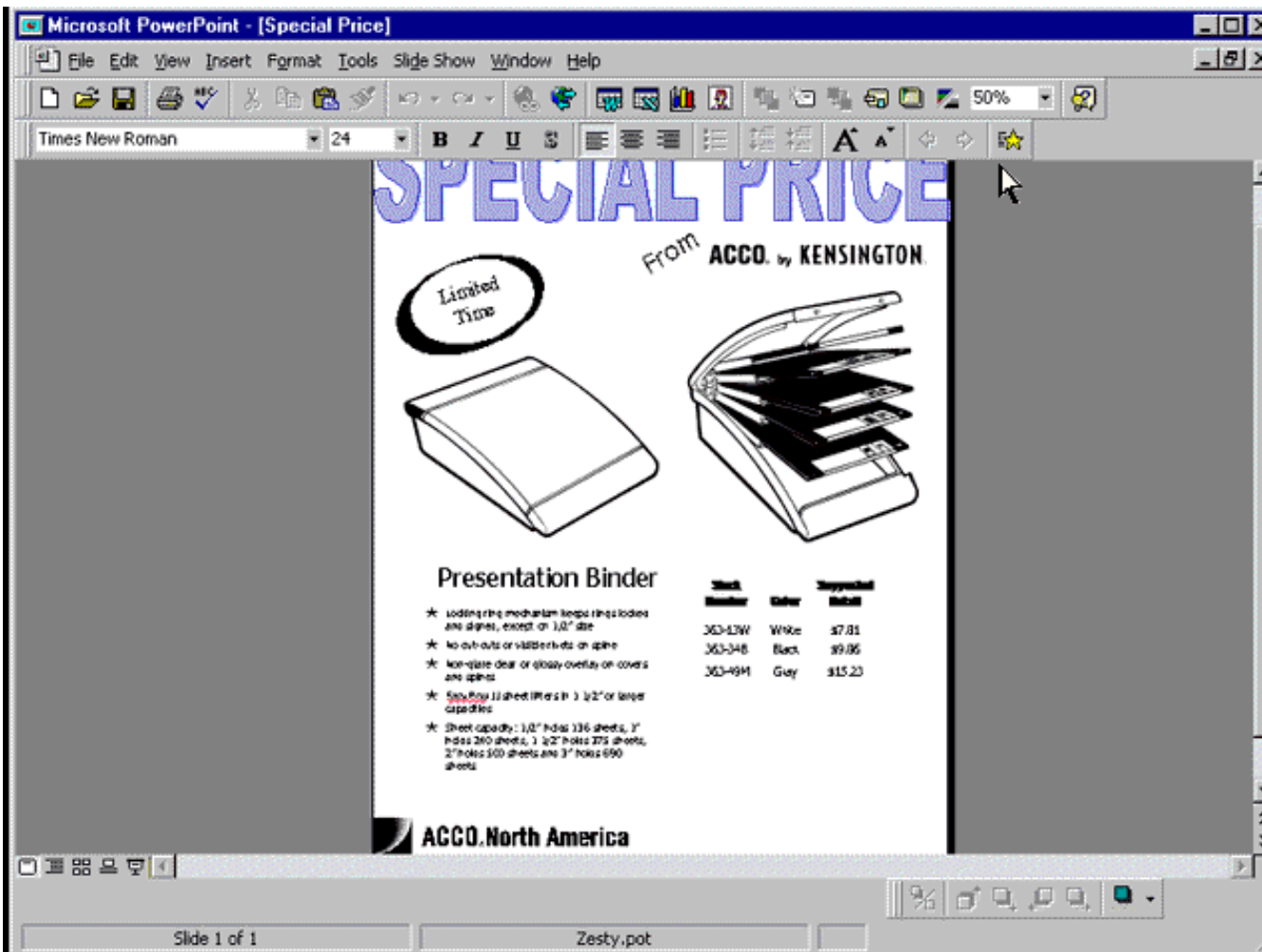
6. Resize

7. Reposition

Save and Print

NAVIGATION:

EXIT | BACK | REPLAY | FWD



ACCO

Identify/Open a Template
 Revise the Text
 Identify/Insert a Picture

1. Delete
 2. Insert
 3. Look in
 4. Folder
 5. File Name
 6. Resize
 7. Reposition
- Save and Print

Insert a Picture Step 1: Delete

- Click on the picture(s) you want to replace
- Press the Backspace or Delete key

EXIT



Microsoft PowerPoint - [jrs]

File Edit View Insert Format Tools Slide Show Window Help

Times New Roman 24 B I U S

Presentation Binder

- ★ Locking ring mechanism keeps rings locked and signed, except on 1/2" size
- ★ No cut-outs or visible rivets on spine
- ★ Non-glare clear or glossy overlay on covers and spines
- ★ EasyFlow II sheet lifters in 1 1/2" or larger capacities
- ★ Sheet capacity: 1/2" holds 136 sheets, 1" holds 240 sheets, 1 1/2" holds 375 sheets, 2" holds 500 sheets and 3" holds 690 sheets

Stock Number	Color	Suggested Retail
363-13W	White	\$7.81
363-34B	Black	\$9.86
363-49M	Gray	\$15.23

ACCO North America
ACCO World, Inc.
300 Tower Parkway

Slide 1 of 1 Zesty.pot

ACCO

Identify/Open a Template

Revise the Text

1. Select
2. Highlight
3. Type
4. Font Size
5. Info Chart

Identify/Insert a Picture

Save and Print

Revise the Text Step 5: Product Information Chart

To zoom in:

- Click on the Zoom box
- Change the zoom percentage as needed

EXIT




Wards

- **Client:** Wards
- **Project:** SMARTstore Point-of-Sale and Electronic Performance Support Systems
 - Touch-screen cash register system for Wards retail stores
 - User interface designed specifically for novice computer users
 - On-line help system provides just-in-time support and access to store policies and index.
 - Touching the “Help” button displays contextual help for this screen
- **My role:** Interaction/UI designer; content writer
- **Tools used:** MS PowerPoint (developed in HTML)



 Help

 Look Up

 Wards Account

 Back

 Cancel Sale

Discount

Touch discount type.

Single item



All items



Tax



Maria B.

Elec. 01

123456

11/19/1998

10:00 AM



How To ... More Questions Navigation Buttons

Tax Exempt (All Items)

Tax Change (One Item)

Tax Change (All Items)

Questions & Answers

What is a "nontaxable" item?

- A nontaxable item is an item that is never taxed by your specific Wards store
- Nontaxable items typically include services and fees such as Performance Guarantees or delivery fees
- Tax laws in each state determine which services or fees are nontaxable

Help

Home

Index & Search

Policies

Equipment

Next

Back

Cancel Help

Maria B.
Elec. 01
123456
11/19/1998
10:00 AM





- **Client:** Comdisco
- **Project:** Account Planning Tool (Web-based)
 - Need for “Solution Selling” sales support tool uncovered during another project
 - Tool to be integrated into existing corporate intranet
 - Administrative (back-end) tool required for frequent updates
- **My role:** Information architect; UI designer; content writer
- **Tools used:** Dreamweaver/HomeSite (for prototype)



Account Planning Tool

Back Forward Home Refresh Images Open Print Search Stop

Address: file:///untitled/Comdisco%20Web%20Site%20final/mainpage.htm

Account Planning Tool

[Home](#) [Directory](#) [Search](#) [Help](#) [Comments](#)

Empl. Resources Business Units/Depts. Applications/Rpts.

Select a Product Group

[Transaction Steps](#)

[Process Flow](#)

Account Planning Tool

The Account Planning Tool is designed to help sales representatives create product-specific selling strategies, and to better understand the overall Comdisco sales process.

Select a Product Group from the menu at left, then click one of these options:

Transaction Steps
Here you will find the detailed sales steps and relevant issues for specific product transactions. You can export selected steps into an Excel spreadsheet, which you can use to create a custom strategy.

Process Flow
Here you can review the overall Comdisco process for the selected product group -- from identifying an opportunity to crafting the final solution.

All InnerCom pages ©1998 Comdisco Inc. [Return To Top Of Page](#)



Asset Management Process: Maintenance: Initial ...

Back Forward Home Refresh Images Open Print Search Stop

Address: []

Asset Management Process: Maintenance: Initial Sale

Home Directory Search Help Comments

Empl. Resources [GO] Business Units/Depts. [GO] Applications/Rpts. [GO]

Identify Opportunity

1. Generate Lead
2. Conduct First Level Qualification
3. Conduct First Level Review
4. Enter into Forecast System

Develop Opportunity

1. Gather Customer Requirements
2. Create Conceptual Design
3. Develop Preliminary Pricing
4. Review Conceptual Solution/Pricing with Customer
5. Refine Solution/Pricing Based on Customer Feedback (iterative)
6. Update Forecast System
7. Gather Customer Requirements

Craft Final Solution

4. Enter into Forecast System

[Who's Responsible](#) | [Tools](#) | [Resources](#) | [What to Do \(and Tips!\)](#) | [Who to Call](#) | [Example](#)

- Who's Responsible
 - Sales
- Tools
 - InnerCom
- Resources
 - InnerCom Guide
- What to Do
 - Steps:
 - Enter opportunity profile in InnerCom Forecast system (minimum close probability of 25%).
 - Possible Step 2 here.
 - Tips:
 - Verify your numbers!
 - Possible tip 2 here.

Export "What to Dos" for this step only.
 Export "What to Dos" for this process phase.





Address: file:///untitled/Comdisco%20Web%20Site%20final/administrator.htm

Comdisco Account Planning Tool Administration

Transaction Steps

To edit or re-sort current Transaction information:

1. ▼
2.

OR

Transaction Types

To Add or edit Transaction Types:

1. ▼
2.

OR

Enter a new Transaction Type

To delete Transaction Types

Process Flow



- **Client:** The St. Paul Companies
- **Project:** Intranet Training Program for Investigating and Evaluating Auto Bodily Injury Insurance Claims
 - Intranet delivery saves on training costs
 - Performance-centered design and just-in-time feedback
 - Knowledge base includes expert advice and glossary
- **My role:** Instructional content writer
- **Tools used:** Dreamweaver/HomeSite

COACH'S CORNER

Good Luck!

The Knowledge Base icons also appear on the main Menu. You can access the same index of Guidelines, Ask the Experts, and Glossary terms as you can within a claim simulation.

Well, this is the end of the introduction on to How to Use the program!

Next I recommend that you read the Overview section to refresh your memory on the claim handling process. Have fun and good luck!

Next, click MENU to go to the actual MENU, then click OVERVIEW.

Main Menu

Introduction

Overview
How to Use

Claim Simulations


Resume Simulation #2


1. Misty Roads
2. The Mac Crash
3. Truck: 1 Bicycle: 0


Confirmation Case

Display Confirmation Case Results

Knowledge Base

 Guidelines

 Expert Advice

 Glossary

PREVIOUS **MENU** **NEXT**

The Claim Handling Process

Coverage
Determination

Investigation

Evaluation

Resolution



Welcome to The St. Paul Companies' intranet course overview. This overview provides a refresher on the claim handling process, shown above, and the activities you will perform as you complete the claim simulations.

This program covers only the Investigation and Evaluation phases, focusing on how to most effectively and efficiently achieve your goals in complex claim situations. The specifics for each case will vary but the goals for your activities in these phases remain the same from case to case. These goals are described in more detail on the following screens.

Click NEXT to continue.

PREVIOUS

MENU

NEXT



The Claim Handling Process

Coverage Determination	Investigation	Evaluation	Resolution
	Liability <u>Property Damage</u> <u>Bodily Injury</u> <u>Fraud Indicators</u>	<u>Reserves</u> <u>Special Damages</u> <u>General Damages</u> <u>Liability</u> <u>Settlement Value</u>	

Investigate Liability

Investigating liability can be an intensive process for a complex claim. You must determine the duty owed the claimant by the insured, if a breach of that duty occurred and if the accident and injuries sustained were the proximate cause of the insured's breach of duty. A thorough investigation is crucial to the successful resolution of your case. Activities that help you achieve your goal include:

- Contact and interview parties to the claim: insured, claimant, and witnesses.
- Investigate accident scene: take photos, locate witnesses, and identify and preserve physical evidence.
- Obtain and review reports and documentation: loss report, police report, prior claims (index).



MENU

 **COACH'S CORNER**

This screen is like the one you will see during a claim simulation. As you progress through the simulation, my feedback and other instructions will appear here in the Coach's Corner.

Click **NEXT** to continue.

Claim Simulation: Coach's Feedback

You don't actually see *me* to the left, but you *will* see my feedback with one of my many hats—each one has a special icon that relates to my feedback and other information on the screen. Here's a key to what the screen shows when you see each hat:



= New information about the case



= A question for you to answer



= Your answer is questionable—not appropriate for the situation.



= Your answer is correct—appropriate for the situation.

You will proceed through each simulation by reading my feedback. Instructions will prompt you to click on the **NEXT** button to move to the next step. To repeat the last step, click on the **PREVIOUS** button.

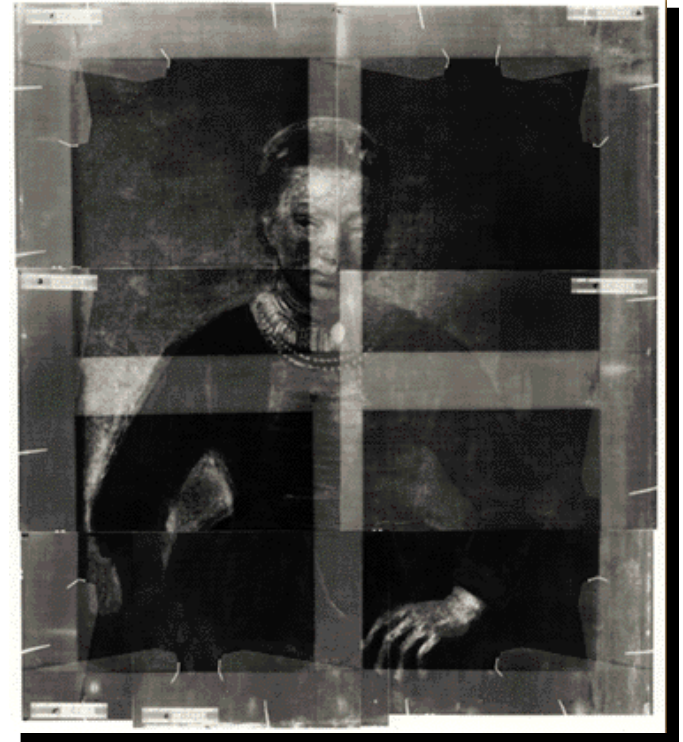
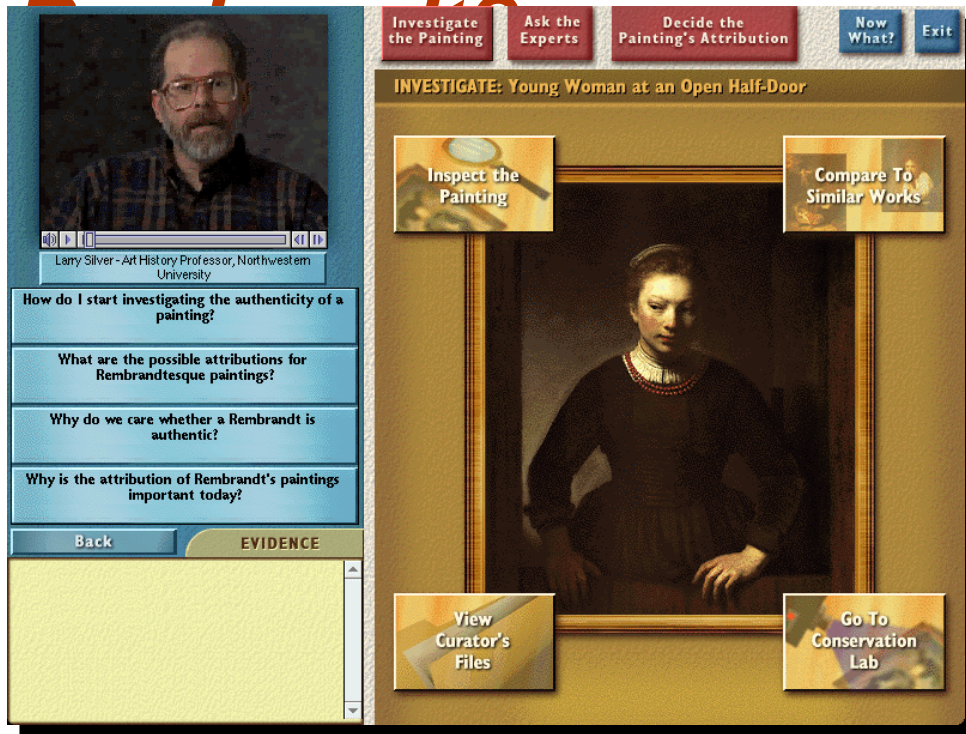
If you need to exit the program before finishing a claim simulation, click on the **MENU** button. The program will automatically put a bookmark at the current step. When you re-enter the program, you can choose to resume the simulation to pick up where you left off.

PREVIOUS **MENU** **NEXT**



- **Projects/Clients:**
 - “Is It a Rembrandt” (Northwestern University, Art History Department)
 - “Déjà Vu Stock Video Archive” (Andersen Telemedia)
- **My role:** Instructional designer/developer
- **Tools used:** MS Word, FileMaker Pro and various proprietary development tools

Is it a



Scenario: Users must identify who painted three Rembrandtesque paintings before the opening of an art museum's Rembrandt exhibition.

Performance Goals: Investigate paintings through visual and technical examination. Decide on an attribution based on evidence gathered.

Learning Goals: Learn about Rembrandt's style and workshop practices, and the complex issues surrounding the attribution process.

Audience: College art history students.

System Features:

- On-line archive of over 450 video clips of leading art experts.
- "Smart" feedback system responds to specific points in the student's argument, and makes suggestions for improvement.



Is it a
Rembrandt?



The Institute for the
Learning Sciences

[Click here to begin](#)





Investigate the Painting

Ask the Experts

Decide the Painting's Attribution

Now What?

Exit



Larry Silver - Art History Professor, Northwestern University

What should I be looking for when inspecting a painting?

Can the initial visual effect of a painting help us decide who painted it?

What does one look for when examining brushwork for the purposes of determining attribution?

What should I look for when inspecting the composition?

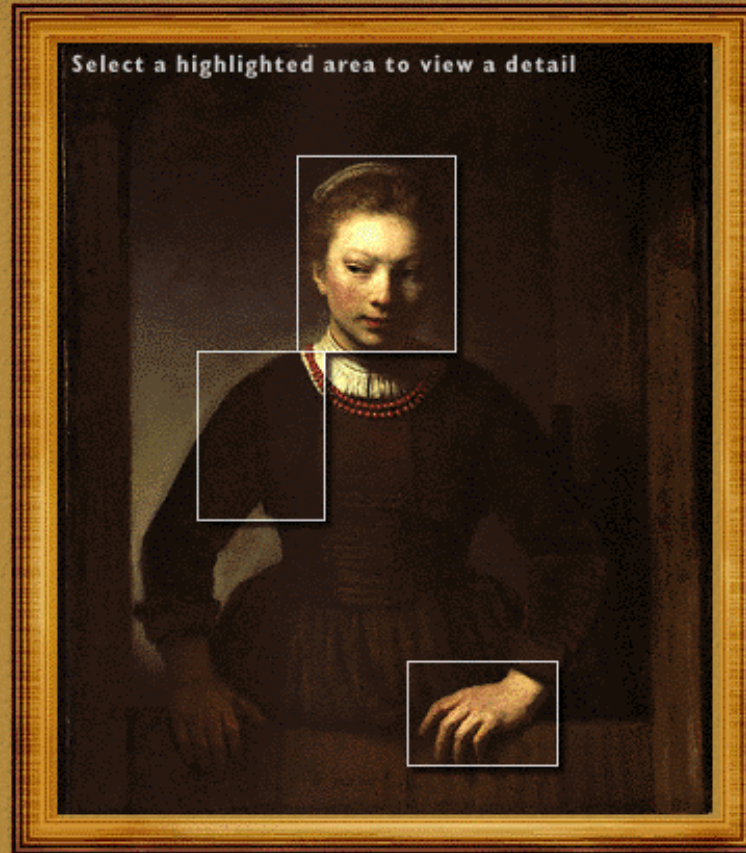
Back

EVIDENCE

INSPECT THE PAINTING: Young Woman at an Open Half-Door

Done

Select a highlighted area to view a detail



INSPECT PAINTING ELEMENTS



Overall Impression



Brushwork



Composition



Palette



Subject



Signature

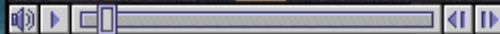
Investigate
the Painting

Ask the
Experts

Decide the
Painting's Attribution

Now
What?

Exit



Catherine Scallen - Art History Professor, Case
Western Reserve University

How does *Young Woman at an Open Half-Door* compare to *Girl Leaning on a Windowsill* in terms of overall impression?

How does the composition of *Young Woman at an Open Half-Door* compare with *Girl Leaning on a Windowsill* (Dulwich)?

How does *Young Woman at an Open Half-Door* compare to *Girl Leaning on a Windowsill* in terms of subject matter?

How does the tonal quality of *Young Woman at an Open Half-Door* compare to that of works of Rembrandt?

Back

EVIDENCE

Portrait of Agatha Bas, which are both undoubted Rembrandt paintings.

- The angled composition of Rembrandt's *Girl Leaning on a Windowsill* is characteristic of Rembrandt.
- The flattened space of the *Young Woman at an Open Half-Door* is not typical of Rembrandt.

COMPARE TO: *Young Woman at an Open Half-Door*

Done



Rembrandt



Rembrandt



Rembrandt Student



Rembrandt Student



YOUNG WOMAN AT AN OPEN HALF-DOOR

Artist Unknown
Signed "Rembrandt f. 1645"
Canvas, 102 x 84 cm



GIRL LEANING ON A WINDOWSILL

Rembrandt van Rijn
Signed "Rembrandt ft. 1645"
Canvas, 82 x 66 cm
Dulwich Picture Gallery, London



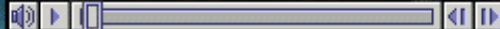
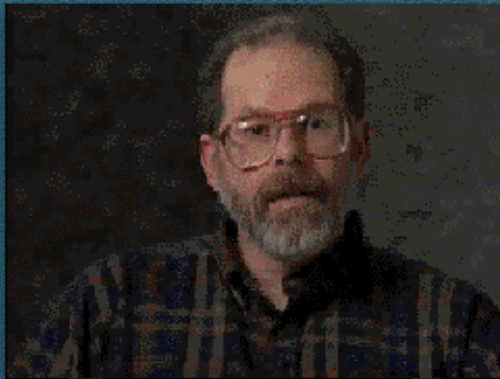
Investigate
the Painting

Ask the
Experts

Decide the
Painting's Attribution

Now
What?

Exit



Larry Silver - Art History Professor, Northwestern University

What information does an X-ray provide?

What does the X-ray of Young Woman at an Open Half-Door tell us?

Back

EVIDENCE

- Lead white can be detected through X-ray analysis
- Rembrandt used lead white in his later stages
- X-rays are sometimes not very informative because they show even the back of the canvas or panel

CONSERVATION LAB: Young Woman at an Open Half Door



RUN TESTS



Done



Dr. Alfred Bader - Art Collector, Alfred Bader Gallery, Milwaukee

Is it valid to say that a painting "just feels like a Rembrandt"?

What does a connoisseur look for to determine a painting's attribution?

What is the Rembrandt Research Project (RRP)?

Previous Questions

EVIDENCE

- When determining a painting's attribution, there are several painting elements to take into account, including subject, signature, support, size, medium, brushwork, and composition.
- Connoisseurs often say Rembrandt had a distinctive touch, marked by an efficiency of brushstroke and a persuasive physicality.

Investigate the Painting

Ask the Experts

Decide the Painting's Attribution

Now What?

Exit

ASK THE EXPERTS...

About Rembrandt

About Connoisseurship

About the Investigation Process

About Attribution

Visual Inspection

Painting Comparison

Curator's Files

Scientific Tests

Overall Impression

Brushwork

Composition

Palette

Subject

Signature



EVIDENCE

- Connoisseurship, documentation, and scientific analysis must all be taken into consideration when deciding the authenticity of a painting
- Young Woman at an Open Half-Door is signed "Rembrandt f. 1645"
- The signature appears prominently in the bottom center of the painting.
- In order to judge whether or not a signature is genuine, one must note the shape of the letters, the fluidity of the signature, and the consistency with known handwriting.
- Ultraviolet analysis of Young Woman at an Open Half-Door reveals some patches of inpainting in the background and in the contours of the sleeves.
- The angled composition of Rembrandt's Girl Leaning on a Windowsill is characteristic of Rembrandt.
- The flattened space of the Young Woman at an Open Half-Door is not typical of Rembrandt
- Rembrandt's Girl Leaning on a Windowsill (Dulwich, an undoubted Rembrandt painting) falls between portrait and type subject categories, like Young Woman at an Open Half-Door
- The background of Rembrandt's Girl Leaning on a Windowsill (Dulwich) has more tonal variety than that of Young Woman at an Open Half-Door.

Investigate
the Painting

Ask the
Experts

Decide the
Painting's Attribution

Now
What?

Exit

DECIDE THE ATTRIBUTION FOR: Young Woman at an Open Half-Door

I believe the...

- painting should be attributed to Rembrandt
- painting should not be attributed to Rembrandt
- evidence is inconclusive

Because of this supporting evidence:

- Young Woman at an Open Half-Door is signed "Rembrandt f. 1645"
- The signature appears prominently in the bottom center of the painting.
- Rembrandt's Girl Leaning on a Windowsill (Dulwich, an undoubted Rembrandt painting) falls between portrait and type subject categories, like Young Woman at an Open Half-Door

In spite of this conflicting evidence:

- The flattened space of the Young Woman at an Open Half-Door is not typical of Rembrandt

Submit
Attribution



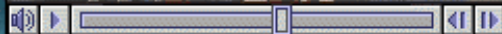
Investigate
the Painting

Ask the
Experts

Decide the
Painting's Attribution

Now
What?

Exit



Doris Campbell - Curator, American Museum of Art

Is the placement of the signature consistent with the way Rembrandt usually signed his paintings?

Can a signature be trusted?

Back

EVIDENCE

- Rembrandt's *Girl Leaning on a Windowsill* (Dulwich, an undoubted Rembrandt painting) falls between portrait and type subject categories, like *Young Woman at an Open Half-Door*
- The background of Rembrandt's *Girl Leaning on a Windowsill* (Dulwich) has more tonal variety than that of *Young Woman at an Open Half-Door*.

INVESTIGATE: Young Woman at an Open Half-Door

A M E R I C A N M U S E U M O F A R T

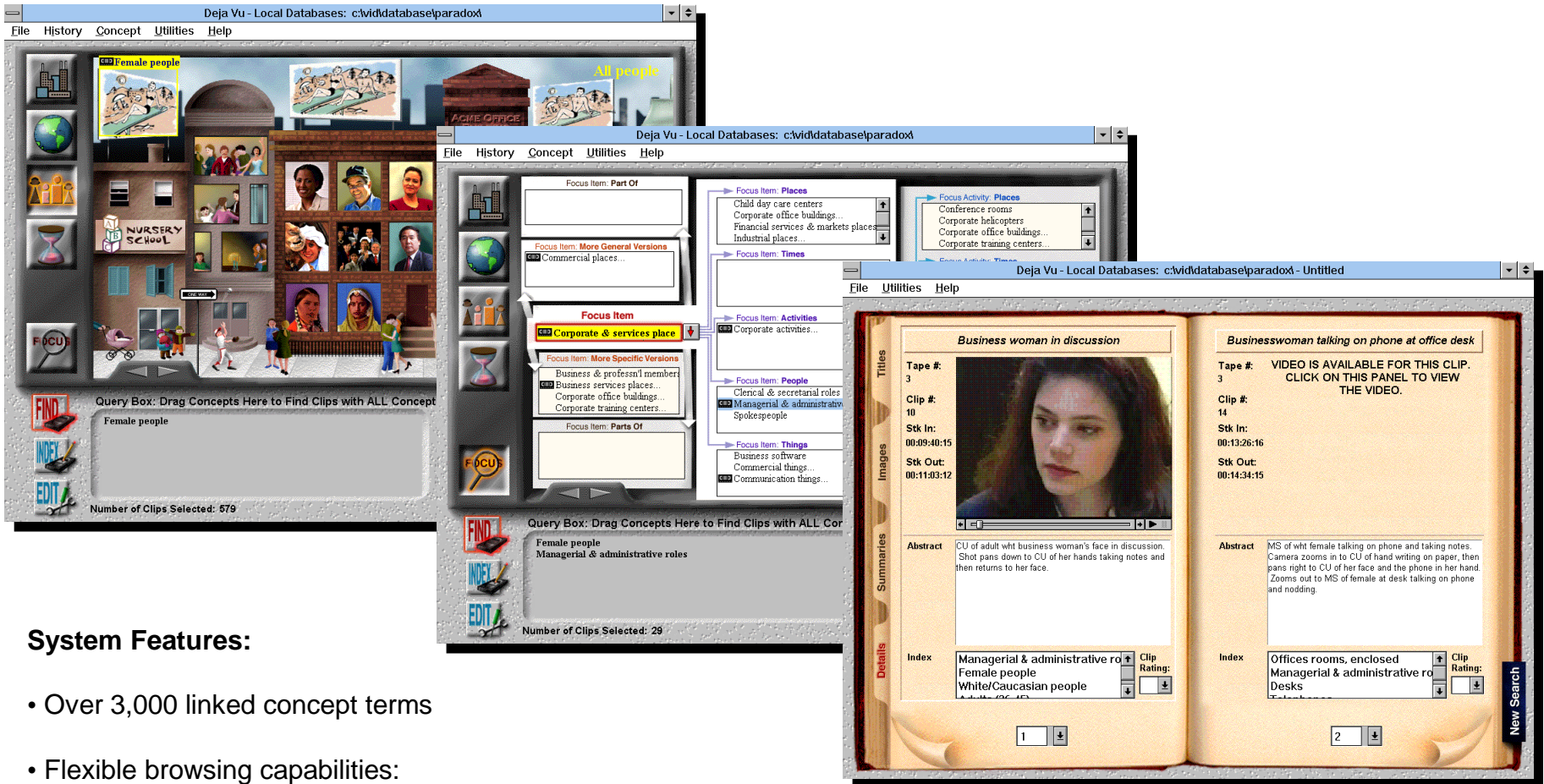
To: Art Investigator
From: Doris Campbell, Head Curator
Re: Painting Attribution

You make the following point:

- The signature appears prominently in the bottom center of the painting.

Is this really relevant? Was that typical of Rembrandt's work or not?

Doris Campbell



System Features:

- Over 3,000 linked concept terms
- Flexible browsing capabilities:
 - visual (pictures)
 - hierarchy of related concepts
 - keyword search
- Clipbook to preview and store clips

“Find me a shot of a businesswoman!”

