

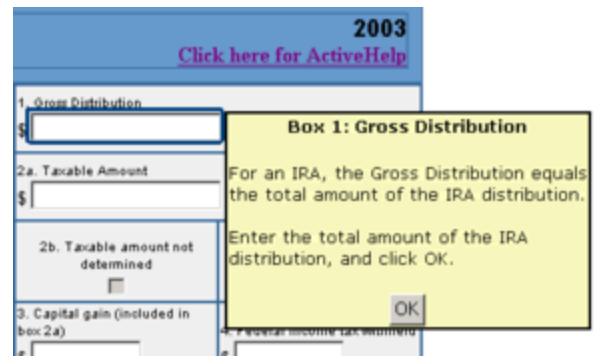


ActiveGuide, a remarkable new tool from RockeTools, enables Christensen/Roberts Solutions to deliver powerful, interactive support for your end users. Co-residing in the same browser window with the live application, a C/RS ActiveGuide support solution can monitor and shape your user's experience with the application.

What does that mean?

Imagine a support solution that can:

- **ensure that users follow the correct procedures** every time from Day One, while avoiding the mistakes novices invariably make.
- **detect the user's location within the application** and provide precise information and decision-making support for the step at hand.
- **choose appropriate branches in the procedure flow** based on the user's previous entries and actions.
- **embed your business rules right into the user interface** to ensure user compliance with broader company policies and processes.
- **provide "wizards" to automatically complete difficult or redundant procedures** and alternative paths and interfaces to make the application more intuitive.
- **be turned on or off as the user wishes** for true just-in-time support.
- provide all of the above **without touching or altering a single line of your application's code.**





## Training Wheels

A C/RS ActiveGuide support solution represents a radical departure from the usual approaches of formal training events, system simulations, and online help. It is an on-demand performance support system that:

- Guides the user through the necessary steps and procedures
- Helps avoid mistakes by not allowing erroneous actions
- Works on the actual application

Because it is available to users on-demand, C/RS ActiveGuide solutions can assist the novice without getting in the way of the expert. They can be thought of as training wheels that get the user up and running with a minimum of fuss and frustration, and enable the user to learn while actually doing. Training wheels give support so that the user can get to where he or she wants to go, and not have to think about the complicated balancing act that may be required to get there. These training wheels can then be removed when no longer needed, as novices turn into experts.

my todo : show inactive tasks

Work	Task Name
	<b>A Training Project</b> 0%
	0% ↓ call Joe
	0% create forum
	0% create literature for rollout

Click on the pencil icon next to the task you wish to edit (create literature for roll-out, for this demo).  
For example, below is the pencil icon for the "create forum" task.

	0% ↑ call Joe
	30% create forum?
	0% create literature for roll-out

But even experts can use a little support from time to time for overly complicated interfaces or complex, infrequently done tasks. Why demand that users waste time and effort trying to master every procedure, when one click will surround them with all the support they need to complete their tasks?

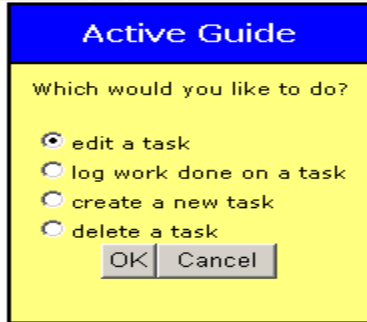


my todo : snow inactive tasks

Work	Task Name
	<b>A Training Project</b> 0%
0% ↓	call Joe
0%	create forum
0%	create literature for rollout

## Real-time workflow

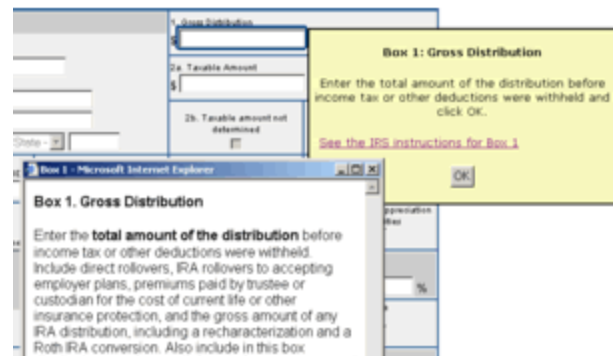
It is not unusual to find an application—or a particular procedure within that application—to be confusing enough to present an obstacle to effective performance and productivity. A C/RS ActiveGuide solution can provide the missing link between the application as it is, and the actual work that needs to get done. It provides support at the exact point in the task when and where the user needs it. It can skip over unnecessary steps in a procedure, and can even complete steps in the task automatically, based on user input and business rules encapsulated within the ActiveGuide support. This speeds up work, and increases productivity for all users.



In complicated applications there are always “sticky” screens. That’s where novice users have to spend time deciding what to input or what to click next based on the information they’ve already entered. These screens are glue traps which slow the work down. ActiveGuide gets the user unstuck by providing such help as decision support, automated or semi-automated steps, or workflow branching based on previous entries.

## Leveraged Learning

When the nature of the application requires that users be trained to mastery on an application, a C/RS ActiveGuide support can be deployed as both a training and a support solution. Solutions can be integrated into a development, or test, version of the application for training, and then transported intact to the live application. This multiple use of the same effort can help orient the user and help him or her gain familiarity with the application. Moreover, the solution remains continually accessible to the user to be reviewed at any time, when needed—something that usually can not be done with other training approaches.



And after training, rather than just send the user out into the workplace armed with thick manuals and ask them to access unhelpful help systems, the same ActiveGuide can be repurposed as on-the-job support.



## Forums

Watch	Forum Name
<b>ActiveHelp Support</b>	
<input type="checkbox"/>	<b>Bugs</b> Owner skirstein, Started Jul/16/2004
<input type="checkbox"/>	<b>Documenting as I Learn</b> A place to put problems, puzzles, or learning moments. Owner skirstein, Started Jul/16/2004
<input type="checkbox"/>	<b>Snippets</b> Owner skirstein, Started Jul/16/2004
<input type="checkbox"/>	<b>Tips and tricks</b> Owner skirstein, Started Jul/16/2004
<input type="checkbox"/>	<b>Wish List</b> Owner skirstein, Started Jul/16/2004

## First Project Support

While the ActiveGuide software is amazingly simple to use for such a powerful tool, it does require time to master its capabilities.

To assist companies that may wish to purchase and use the tool, C/RS provides its unique First Project Support solution. Under this plan, companies engage C/RS to design and develop an initial ActiveGuide solution. This ensures the success of the first project and sets the stage for creating and deploying additional solutions in the future. As C/RS develops it

solution, our staff will engage our client's staff in the process, training and coaching them on how to make the most effective use of the ActiveGuide tool.

Once the project is completed, our client's staff will be prepared to take on the next project, with a minimum of support. This process passes total control over the solution to our client and enables them make effective use of their internal staff.

## How it works

C/RS ActiveGuide solutions work between the application and the browser. The application is not touched or altered, and the support solution runs only from an instance of the browser.

The best way to understand what a C/RS ActiveGuide solution can do is to see it in action. Take a look at the demo solutions that are launched from this page:

[www.crsol.com/dotproject/launch\\_activeguide.htm](http://www.crsol.com/dotproject/launch_activeguide.htm)

**Tasks**

my todo : show inactive tasks

Work	Task Name
0%	<b>A Training Project</b> 0%
0%	call Joe
0%	create forum
0%	create literature for rollout

**The Scenario**

We'll use a typical scenario to demonstrate what the Active Guide experience would be like for an end user.

Assume that one of the tasks in a project you have been managing has grown larger and has become more critical than originally planned. You must edit the task data in order to increase the budget, reset the priority to high, and extend the duration by 5 days.

We'll assume that the task is creating the literature for the roll-out of a new application.

OK Cancel

In addition: RocketTools has detailed demos on its website, showing the various "building blocks" which can go into an ActiveGuide script.

<http://www.rocketsoftware.com/portfolio/activehelp/demosag.htm>



## C/RS End User Training/Support

Hal Christensen and Lou Roberts, founding partners of C/RS, are recognized for their substantial experience in delivering powerful performance support solutions for end-users, and have earned a solid reputation from their customers and colleagues. Hal has been a thought leader in the emerging Electronic Performance Support movement from its inception, developing pioneering technology and programs to deliver on-the-spot knowledge and tools to thousands of workers. As members of the Performance Support Leadership Council - started in 1995 by Gloria Gery - Hal and Lou have taken an active role in defining this growing industry.

Together, Hal and Lou have headed up projects to provide *Day One Support* to end-users in numerous organizations, including Prudential, AT&T, Lucent Technologies, ADP, PricewaterhouseCoopers, and Merrill Lynch. Each program has a common goal: enabling inexperienced users to accomplish their assigned tasks without having to endure extensive, expensive, and often ineffective, training programs. Each represents two of C/RS' guiding principles:

1. **Real productivity comes when employees learn at their Point of Performance**—that is, the precise time and place at which they need to learn, and can make the most effective use of that learning, to accomplish their tasks. Studies have continually shown that employees gain far more knowledge and skills—and do so far more quickly—while doing their jobs rather than while preparing to do them.
2. **Real productivity comes not from increasing training but rather from finding ways to reduce the need for it.** C/RS' Performance Support programs break down the learning barrier that prevents new employees from immediately making use of the work-saving applications that have been developed for them.

Among the End-User Training/Performance Support projects C/RS has successfully completed in recent years are:

1. Several programs to support AT&T customers in their use of computer-based telecommunications services and software. The solutions provided both training and instant-access task support. That ensured effective learning as well as on-demand guidance for use of the applications' features.
2. Several support programs to help the Lucent Technologies sales force gather and analyze the customer data they needed to configure call center telecommunications solutions.



## C/R Solutions Active Guide Solutions



3. A Performance Support program to train Prudential sales and sales support people on a new "illustration" application. The program included on-demand, step-by-step animation and guidance for each of the major tasks they needed to perform.
4. A program to train and support users at 500 client companies using ADP's warehouse and inventory management application.
5. Several programs to train and support Coopers&Lybrand (now PricewaterhouseCoopers) employees on the use of internal applications.
6. Programs to train and support Merrill Lynch employees on the use of securities processing software applications. The solutions included animations, simulations, and documentation that were made available for use both as training prior to using the application and as step-by-step task guidance while working with the application.