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A Courseware Authoring Tool Evolves: ToolBook Instructor 9

By Tom Hall

Change in the business environment drives product evolution. Product success depends in large part on keeping up with demands for speed, power, and adaptability, and this is just as true in e-Learning development as it is anywhere else in business. As we have watched a bewildering array of new products coming into the market in response to the need for rapid development, it has sometimes been easy to lose sight of products that have continued to innovate and satisfy their users’ requirements. Developers have to keep up too, and that’s what this article is about.

SumTotal Systems released a new version of ToolBook Instructor on June 4, and I’d like to give you an overview of the product and its capabilities. There are some important new features and some improved old ones. The changes should help authors create e-Learning applications faster. Version 9 also offers additional help in customizing and extending the product, and it better supports Vista, Microsoft’s latest version of Windows.

In the next few pages, I’ll give a quick overview of how ToolBook Instructor 9 works, for readers who are unfamiliar with the product and previous versions. I’ll review the most important new features in Version 9: Smart Styles and Smart Pages, Book Explorer, and Vista support. Then I’ll give you a quick run-through of the other significant changes, including improvements to the key Editors (Actions Editor and Simulation Editor), and the new Book and Lesson Design Wizards.

ToolBook has been an important part of the e-Learning development landscape for the past two decades. However, “long-standing” does not mean “standing still,” and ToolBook Instructor has just launched a new version with a number of important changes that you should know about. This week’s article gives you an in-depth look at how the product is keeping up with your needs.

A publication of
How does ToolBook work?

ToolBook has been a “name” in e-Learning authoring since it appeared in 1990. Over the last 17 years a series of updates and expansions have appeared as computing environments evolved and the demands on e-Learning applications changed. The traditional strengths of the product line have been its deployment media and its extensibility and power, the latter two thanks in large part to its OpenScript programming language. ToolBook Instructor continues to be an industry standard for e-Learning and today it is one of a suite of products published by SumTotal Systems.

ToolBook Instructor supports three important functions in the e-Learning world. Probably, most developers think of ToolBook Instructor as an authoring solution for interactive learning content and scenario-based training for delivery in HTML format on the Web, or in native mode on CD-ROM, over corporate networks, and through any standards-compliant Learning Management System. ToolBook Instructor has built-in support for SCORM 1.2, SCORM 2004, and AICC.

However, ToolBook Instructor also creates software application simulations, using its Simulation Recorder and Simulation Editor. Simulations support demonstration, practice, and assessment. Finally, it is an excellent vehicle for developing assessment and testing applications, including multiple assessment types (true/false, multiple choice, drag-and-drop, matching, fill-in-the-blank, etc.) and the ability to randomize questions and answers. Developers can create Section 508-compliant applications in any of these three capability areas.

ToolBook Instructor is primarily intended for use by e-Learning design and development professionals. A companion product which I will not be addressing in this article, ToolBook Assistant, provides a way to include subject matter experts and non-technical professionals in the development process.

Object orientation

Since ToolBook Instructor is an object-oriented environment, everything that the developer works with is an object. Within this environment, ToolBook uses a book metaphor to organize content and interaction, different from the frame, slide, or flowchart metaphors that you have probably seen in other authoring tools.

Each ToolBook application is a book and each screen is a page. Each book is an object, and each page within a book is an object. The various elements on each of the pages, such as buttons, fields, and graphics, are also objects. Each object has properties,

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which determine what the object looks like, what it does, how it behaves, and so on.

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**The ToolBook authoring environment**

There are two modes of operation in ToolBook: Author and Reader. After opening a new book, the developer is in the Author mode. In this mode, the developer is in control of what happens in the book and has the ability to set up the book as necessary. The developer can reenter the book at any time in Author mode to make additions or changes.

In Reader mode, ToolBook displays what the learners will see. During development, the author can switch to Reader mode to view and test the book.

The **Authoring window**

If you are familiar with earlier versions of ToolBook, you will notice that SumTotal made some significant changes to the authoring environment. For example, the programmers upgraded the user interface with newer icon styles, and replaced the Specialists with Wizards.

Figure 1 shows the main Authoring window. As with all Windows applications, ToolBook has a menu bar that provides access to most of the commands available in the application. Likewise, a tool bar across the top of the window contains icons that provide quick and easy access to many of the same commands found on the Menu Bar. The developer can get to everything he or she needs from this window.

The **Catalog and Tool Palette**

The small vertical set of icons on the right side of the window is the Tool Palette. The developer can use the Tool Palette to draw objects such as buttons or text fields while building a page.

On the left side of the window, the Catalog provides a large variety of pre-programmed objects for designing applications. This is a major feature of ToolBook Instructor 9, as it has been for many past versions of ToolBook. Some of these objects are more or less static, such as graphics and text fields. Others are preprogrammed for certain behaviors: navigation objects, question objects, media players, and more.

The Catalog organizes the objects into Categories (Action Objects, Buttons, Draw Objects, and so on).

The developer can drag the desired object from the Catalog onto the page. Figure 2 on page 4 provides a closer look at the Catalog and some of the objects in one of the Categories. Notice that the last Category is “My Objects.” The developer can create additional objects or enhanced versions of existing objects and store these in the Catalog.

**The structure of ToolBook pages: Foreground and background**

The open area in the center of the window in Figure 1 is the actual page. In this example, you can see that several objects are already on the page. These include:

- The text box on the right (“Lorem ipsum...”)
- The graphics container (“Reusable Graphic”)
- The navigation buttons at the bottom of the page
- The prompt (“Click Next to continue.”)
- The fields for Lesson, Chapter, and Topic Titles

The page actually consists of two distinct areas: the foreground and the background.

The background typically holds objects that are going to be common to all pages, as well as the primary graphic for the current style. In Figure 1, the navigation buttons are on a graphic that has a bluish gradient with an orange stripe at the bottom. Most of the background (and therefore most of the page) is white space. This background also has three fields: a Title (%LESSONTITLE%), a Subtitle (%CHAPTERTITLE%), and a Prompt (Click Next to continue.). In Reader mode, ToolBook replaces %LESSONTITLE% with the actual name of the lesson. If the lesson has chapters, %CHAPTERTITLE% appears as the name of the current chapter. The Navigation buttons have preset hyperlinks to allow Reader mode navigation to the

**The way that an object, such as button or a text field, looks is a basic property, and for the most part it is basic properties that control how an object looks. Thus, the developer has the responsibility for making decisions as to how an object looks and for setting these properties.**

Figure 1

The Authoring window provides developer with access to every tool and feature of ToolBook Instructor 9.
next page in the book, to the previous page in the book, or to a Menu page.

The foreground of this page has a Topic field (%TOPICTITLE%) and a body text field (the field with the “Lorem ipsum” text in it). In addition, this particular page type has a placeholder object, used to display a graphic.

You can layer objects on either the foreground or the background to obtain any desired effect.

Object properties

The way that an object, such as a button or a text field, looks is a basic property, and for the most part it is basic properties that control how an object looks. Thus, the developer has the responsibility for making decisions as to how an object looks and for setting these properties. For instance, these are a few of the properties that can be set for a button:

- Bounds (defines both location and size)
- Name
- Caption (words on the face of the button)
- Graphic (the image that appears on the button)
- Enabled or Disabled

A few of the properties available for a field include:

- Bounds
- Name
- Font settings
- Paragraph settings
- Border style

A great many of the objects in the Catalog, such as Question Objects and Media Players, have extended properties. Extended properties are behavioral properties, that is, they control how an object acts or reacts to learner interaction in Reader mode. For instance, a developer could have a Multiple Choice Question object (which actually is a group of four button objects) on a page that could be set up so that the first answer is correct and so that ToolBook provides reinforcing feedback when the learner chooses that answer. At the same time, the developer can set up the other buttons to provide corrective feedback when chosen. Another extended property would be the scorekeeping, and how many attempts the learner has to answer the question.

Extending ToolBook: OpenScript

Since its first appearance, ToolBook has included an integrated proprietary programming language, called OpenScript. This is a full-featured automation language, comparable to C, Pascal, and other object-oriented languages, not limited to scripting only. Although ToolBook does not require programming, the developer who can use OpenScript will be able to extend, tailor, and otherwise customize ToolBook to do practically anything required. In most cases, the developer will be able to do this more quickly with OpenScript than with C or C++.

OpenScript is not difficult to learn, and the effort pays large dividends in direct control and expanded capability of ToolBook applications.

Important features in ToolBook Instructor 9

Now that I have given you a rapid overview of ToolBook Instructor, I’d like to take a moment to show you three important features of the new version of this authoring system. These features are the ones that the beta testers of ToolBook 9 identified as the ones in which they had the most interest: SmartStyles and SmartPages, Book Explorer, and Vista support.
Development Techniques

SmartStyles / SmartPages

Two new Catalog categories, Styles and Pages, open an easier way to quickly create the core components for a lesson. Once the core of the lesson is built, the developer just adds the specific content. In my opinion, these are the two most exciting new features in ToolBook Instructor 9, mainly because of the amount of work they do in establishing a uniform, standard look-and-feel to a book.

SmartStyles

SmartStyles provides uniformity across the various methods available in previous versions of ToolBook for building an application, including Templates and the Book Specialist (now called the Book Wizard). SmartStyles makes available a wide variety of page styles and pre-defined common page types that respond to today’s learning needs. This new feature also provides developers with the ability to create their own new styles and page types as desired. When the developer adds a new page to a book, that page will then use the book’s current style. The developer can restyle the entire book by selecting a new style from the Catalog.

To clarify things a bit, ToolBook calls this feature “SmartStyles.” A Smart Style is the individual style. The Styles category in the Catalog contains all the available Smart Styles.

SmartPages

The SmartPages feature provides many new page types, with the actual pages being Smart Pages. The Pages Category contains the available types. When the developer adds a Smart Style, ToolBook applies a background graphic (called a Smart Background) to the book, creating a uniform graphic design throughout. The background contains a Navigation group containing buttons that have a style that fits with the background graphic. Additionally, Title and Subtitle fields are available for text display on all pages, and the format of these fields is based upon the current style. For instance, one style could be Verdana while another style might switch the text formatting for these primary fields to Times New Roman.

The SmartPages types include:
- Menu
- Bullets
- Text
- Text and Image
- Text and Media
- Text with Two Images
- Bullets
- Multiple Choice Question
- True-False Question
- Fill in the Blank Question
- Horizontal Button Options (an interactive page)

Example

Figure 3 is an example of a page, to illustrate how a page looks when the developer uses a “Text and Image” Smart Page and a Smart Style. (If the figure looks familiar, it is the fleshed-out page from Figure 1.)

In Figure 3, the Menu, Back, and Next buttons are part of the Navigation group on the page background. Notice how the button graphics match the background graphic from the Smart Style. Likewise, the two lines of text at the top are the fields on the page background; again, the Smart Style determined their formatting. The information displayed in these two fields automatically comes from properties in the book object, specifically the Book title and the Chapter title.

The text “Smart Pages” (just above the graphic) is part of the Smart Page foreground, which ToolBook displays automatically based on the name of the current page. The Smart Style of the book controls the formatting of this field, as well as the field displaying the instructional text.

One of the Smart Page properties controls the page layout, and the developer can change this. Thus, the designer could put the text on the left and the graphic on the right. Several Smart Objects in the Catalog, if added, would take on the current style. Finally, the developer can change the entire look of the page by simply dragging a different Smart Style from the Catalog.

Book Explorer

The new Book Explorer takes the place of the Object Browser and Page Browser found in previous versions of ToolBook. The Book Explorer allows the developer to easily navigate through the book, viewing the contents and structure of the lesson.
versions of ToolBook. This feature gives the developer an overview of the entire book. (Think “Windows Explorer.”) It also provides access to all pages, backgrounds, and objects from an easy-to-use interface. Developers can quickly move, delete, copy, and edit all ToolBook objects from the Book Explorer.

**Vista support and improved Web browser support**

ToolBook Instructor 9 is a stable 32-bit, fully Vista-compatible application. It will allow developers to author and deploy applications to the newer operating systems, including 64-bit Windows. It now supports long filenames.

HTML products created with ToolBook Instructor 9 work well with Internet Explorer 7. This includes expanded support to address the infamous “Eolas” update that affected how Web pages that use ActiveX and other dynamic content items display. This eliminates the “Click to activate” prompt.

**The rest of the story**

There is much more to ToolBook Instructor 9 than the features I’ve highlighted so far. In the space remaining, I’ll give you a fast walkthrough of some additional improvements that will help you author better e-Learning applications faster.

**Templates**

When you start up ToolBook Instructor 9, one of the dialog boxes contains a Template tab. This provides access to a good selection of pre-built templates that will save time when you are building certain common types of applications. These include templates for doing jobs other than training or e-Learning. Each template has its own design (Smart Style) and outline. Once you save your chosen template as a book, it is easy to add, duplicate, and delete page types and to change the style. The templates that come in the box include:

- Online Training Business Plan
- Presentation
- Product Catalog
- Sales Product Training
- 10 Question Quiz
- Advanced Content (One or Two Chapters)
- Advanced Training
- Basic Content
- Basic Quiz
- Basic Training

**New Catalog categories and objects**

I’ve already mentioned the new Pages and Styles categories. Another new category related to these is Questions; it contains a single object for both Multiple
Choice and True-False questions. The developer’s Style selection determines the graphics on the Multiple Choice and True-False buttons. You can still have the old categories, Questions (Multiple Choice) and Questions (True-False), from earlier versions of ToolBook if you customize the Catalog.

ToolBook Instructor 9 replaces the old Navigation Objects category with a new Navigation Panels category.

Version 9 also introduces some new objects. The Navigation Panels category contains a new Chapter Menu object, for example. The Action Objects category picked up a ShowInfo object, along with a ShowMore and ShowLess object.

**LiveXtensions**

LiveXtensions are new product features that extend ToolBook beyond what the shipped product provided; formerly this was the Developers Exchange tools. It is a subscription service with which you are assured that you have all the latest targeted functional improvements, new features, and custom developments available.

**Book and Lesson Design Wizards**

In previous versions of ToolBook, the Startup Dialog box contained a Book Specialists tab, with three “Specialists”: Full, Lesson Design, and Quick. These Specialists assisted you with setting up certain key properties for your book. Now this tab is Book Wizards, and it contains two Wizards that replace the three Specialists. These are the Book Wizard and the Lesson Design Wizard, and their purpose is to provide you with a way of quickly building your ToolBook applications.

The Book Wizard supports you as you build the basic skeleton for a variety of different application types. The Lesson Design Wizard allows you to build a lesson using existing text and media (graphics, video, and audio), by telling the Wizard where they are located.

ToolBook Instructor 9 offers a variety of styles and a good selection of lesson outlines. From the Book Wizard, the developer can:

- Define the book title
- Choose a deployment method
- Choose a Smart Style
- Choose the type of book (Standard or Quiz)
- Choose the book outline (or create a custom outline)
- Choose the size of the pages in the book

Figure 4 shows the Book Outline screen of the Book Wizard, with a Simple Quiz outline selected. Some of the other types of Book Outlines include:

- Simple Quiz – 10 Questions
- Simple Training
- Skill Training

Each Book Outline has a set of associated Page Types. For instance, you can see from Figure 4 that the Simple Quiz includes a Title, Objectives, several Interaction choices (Multiple Choice, True-False, Fill in the Blank), and a Summary or Score. If the developer chooses to create a Custom Outline, then a large assortment of page types is available.

**Actions Editor**

The Actions Editor is a great feature, and one that was in previous versions of ToolBook Instructor. The Actions Editor is a visual programming tool that allows a developer to set up complex scripting actions without writing any code. It also gives the developer a way to handle events, such as “On click,” “On mouse over,” “On mouse off,” “On load page,” and “On unload page.”

The developer can start and stop media, calculate expressions, add if/then/else loops, set or change properties of objects, declare variables, do hide and show, and use trigger objects. All of this functionality will export to HTML for viewing in a Web browser.

The interface of the Actions Editor has menus and a toolbar that allows adding interactive behaviors to objects in an application. Using this interface, developers can create Action Sequences, behaviors that ToolBook Instructor 9 carries out in a specified order.

Action Sequences can include prompting for user input, providing alerts, playing media, changing an object’s properties, and specifying conditions for the execution of an action. Some sort of event such as an “On click” or an “On mouse over” triggers an Action Sequence for an object. With the easy-to-use inter-
face for the Actions Editor, you can choose an event, insert an action, define both local and global variables, and add conditions and loops. Developers also have one-click access to the properties for a selected action.

Figure 5 shows the Actions Editor programming environment. In addition to the menus and toolbar, an Actions Palette on the left side of the dialog box supports drag-and-drop addition of a variety of actions to the code window. The result is an Action Sequence.

In Figure 5, an “On click” event has been chosen from a drop-down list. Likewise, words like “caption” and “visible” as well as the name of the object (“dam”) all came from a drop-down list. This is an Action Sequence for a button that shows and hides a picture of Hoover Dam. The caption (the words on the face of the button) change dynamically while using words like true and false controls the visibility of the picture. The words caption and visible are properties of the current object. The Action Sequence shown illustrates a very powerful part of the Actions Editor, the ability to set up a control structure (If/Else If) where things take place based upon certain conditions (the current caption of the button in this case).

**Simulation Editor**

ToolBook Instructor 9 provides support for authoring performance-based software simulations. A software simulation allows a learner to try out a program interface or view the steps to accomplish a task. It consists of a series of steps that describe changes on the screen. During a simulation, a learner may interact with buttons and menus and other objects. Because a simulation is close to the real experience of using a software application, it is a very effective way to learn procedures and gain familiarity with a program.

You can build simulations in ToolBook that imitate other software programs, by using the Simulation Editor. Figure 6 shows the Simulation Editor in use creating a page where there are two steps. A toolbar at the top of the Simulation Editor allows the developer to add steps and to identify correct and incorrect actions (called trigger events).

The added steps and events appear in the top part of the editor while the grid below is where the developer sets the desired properties, such as reset options, scoring options, and supported modes. Using this editor, the developer can drill down to the step or event level and the grid dynamically changes to display properties at those levels. For instance, at the step level, the developer can input the instructional text and feedback text. At the event level, the developer can determine what happens after any incorrect attempt. The developer does this by accessing Action Methods and writing Actions Editor code to cause the simulation to respond in some manner, such as showing a highlighter to direct the learner’s focus to the place where they should click.

Simulations can support Demonstration, Practice, or Assessment modes. Simulations in all three modes
will export to HTML for browser deployment. In Practice mode, the learner gets to “Try It,” while in Demonstration mode the learner gets a “Show Me.” Assessment mode is similar to an exam or quiz.

The scoring generated by Assessment mode can go to a Learning Management System (LMS), such as the TotalLMS. The intent in ToolBook Instructor 9 is to provide a single Simulation Editor on any ToolBook page that you can use to set up a software Simulation with one or more steps.

As the developer, you can define where and when the instructional text and feedback will appear. Trigger events can include a single button click (left click), a right-click, a double-click, pressing a key, or selecting an item from a list-box or combo-box. Evaluation objects (objects that the learner interacts with before clicking a button, etc.) such as input fields, radio buttons, and checkboxes provide a high degree of fidelity in the simulation. For instance, instead of just clicking a button to advance to the next step in a lesson, you could present the learner with an input field for text entry before clicking a button to advance.

The system supports step-level feedback, event-level feedback, and object-level feedback, meaning that you can display multiple forms of feedback. Feedback can appear in a feedback field or in popup boxes that appear next to the object in question.

Figure 7 shows a lesson built using the Simulation Editor where the learner interacts with a practice lesson on how to perform an online library search. In the simulation, the learner has three attempts to perform a step correctly.

In the lesson in Figure 7, the learner has failed in three attempts. Feedback appears, along with a highlight that shows the learner where to click. In this lesson, a Show Me button is available for each step and allows the learner to view a demonstration of the step. If the learner chooses this button, an animation displays with the cursor going from the middle of the screen to the location the learner should have clicked, while a green highlight displays around that area. A Try Again button is available at that point so that the learner has the option to practice again. Another option would have been to set this lesson up as an assessment of the learner's knowledge. In that case, the learner would only have one attempt and the application could score the lesson at the end, in a manner similar to a normal exam or quiz, and report the score to an LMS.

Potpourri

There are a number of other functions, features, and improvements that don’t exactly fit anywhere in what I have written. In case you are interested, here are some bullet points on these odds and ends.

- New Go To Feature — From the Edit menu, developers can now choose Go To to obtain a Go To dialog box. This box provides options for navigating to any page by page name, page ID, or page number as well as to any background by name or ID number.
- Enhanced Quiz Summary Feature — From the Tools menu, developers can choose Quiz Summary to obtain a detailed summary of all questions in a book. A Generate Checklist button provides a means of saving important question information to a text file.
- Enhanced Lesson Properties Feature — The Behavior tab of the Lesson Properties dialog box now provides a quick way of setting up a quiz to be randomized, as well as allowing a quiz to be set up to draw a random sub-set of questions.
- Easier Deployment in a Corporate Environment — The ToolBook setup application supports the Windows operating service “Windows Installer” and the authoring environment runs as a normal user. Also, the AutoPackager now supports MSI installations.
- Easier Updates — An enhanced Version Updater now makes it easier to update books created in previous versions of ToolBook.

Summary

Even in a long article such as this one, it is challenging to cover all the key points in a major product. The Book Wizard supports you as you build the basic skeleton for a variety of different application types. The Lesson Design Wizard allows you to build a lesson using existing text and media (graphics, video, and audio), by telling the Wizard where they are located.
release like ToolBook Instructor 9. However, I hope that I have given you a working understanding of ToolBook’s strengths and the important features of the new version.

ToolBook Instructor 9 is certainly equal to the demands of any courseware development project, and I would recommend considering it seriously if you are in the process of evaluating tools for adoption. If you have questions about my review or about the aspects of the product that I left out, please contact me at the e-mail address I’ve given in the Author Contact section below.

**Author Contact**

Tom Hall is a recognized expert in the use of ToolBook with 16 years of experience as an author, developer, consultant, and trainer. Tom is co-owner of TCC Publishing, Inc. He has written and published a total of 12 books on ToolBook since 1991. He is now working on two more books for ToolBook Instructor 9. Tom is currently a contractor with Verizon’s Customer Implementation Support team, a job he has been on for almost three years. Over the years, Tom has worked with many prominent companies developing a variety of CD-ROM and Web applications using ToolBook, and has been a contract trainer for SumTotal Systems. He was an educator for 15 years and during that time was a Syllabus Scholar, one of five people in the academic arena considered leaders in the use of technology in the classroom. Tom Hall’s work has won many awards over the years.

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Discuss this article in the “Talk Back to the Authors” Forum of Community Connections (http://www.elearningguild.com/community_connections/forum/categories.cfm?catid=17&entercat=7). You can address your comments to the author(s) of each week’s article, or you can make a general comment to other readers.

Additional information on the topics covered in this article is also listed in the Guild Resource Directory.

In the Archives

This is Tom Hall’s first article for Learning Solutions e-Magazine, and our first article on ToolBook Instructor.
The eLearning Guild is a Community of Practice for e-Learning design, development, and management professionals. Through this member-driven community we provide high-quality learning opportunities, networking services, resources, and publications. Members represent a diverse group of managers, directors, and executives focused on training and learning services, as well as e-Learning instructional designers, content developers, Web developers, project managers, contractors, and consultants. Guild members work in a variety of settings including corporate, government, and academic organizations.

Guild membership is an investment in your professional development and in your organization’s future success with its e-Learning efforts. Your membership provides you with learning opportunities and resources so that you can increase your knowledge and skills. That’s what the Guild is all about ... putting the resources and information you need at your fingertips so you can produce more successful e-Learning.

The eLearning Guild offers four levels of membership. Each level provides members with benefits commensurate with your investment. In the table you will find a comprehensive summary of benefits offered for each membership level. To learn more about Group Membership and pricing, go to www.eLearningGuild.com.

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<td>X</td>
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<tr>
<td>Online Event Site License Discounts</td>
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</tbody>
</table>

*See www.eLearningGuild.com for details
✓ = Included in Membership  X = Not available  $ = Separate fee required

The eLearning Guild organizes a variety of important industry events...

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**The eLearning Guild** organizes a variety of important industry events...

**eLearning Guild 2008**

**The Annual Gathering**

April 15 - 17, 2008

ORLANDO, FL

**Learning Management Colloquium**

April 16 & 17, 2008

ORLANDO, FL

**The eLearning Development Conference & Expo**

November 5 - 8, 2007

SAN JOSE, CA

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CHECK ONLINE for topics and dates!