CellCast
Administrator Guide

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Customer & Partner Distribution Only:
Supplement to Instructor-Led Training

Basic Functionality Covering:
- Strategy & Approach
- Typical Implementation Tasks
- *CellCast Basic* Functionality
- *CellCast Advanced* Functionality

The CellCast Administrator Guide is a set of instructions designed to assist Administrators in the planning, creation, publication, deployment and tracking of CellCast assignments to their mobile audience.

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Introduction

Section Administrators in the planning, creation, publication, deployment and tracking of CellCast assignments for their defined mobile users and learning communities. We strongly recommend new Administrators review these materials thoroughly before accessing and experimenting with their new *CellCast Solution* platform or as add-on functionality to an existing OnPoint LMS/LCMS Learning Portal platform.

Plan Your Strategy & Approach

Preparation is the first and most important stage in creating and deploying mobile learning CellCast assignments and is an essential element of learning how the core *CellCast Solution* platform operates. To ensure future success, consider each of the following high-level topics and prepare an appropriate strategy to address them in your configuration efforts:

1. **Organizing Your User Community (All Levels)**. Start by defining who your mobile learning audience is and by collecting relevant information about them including their general user profiles, mobile device types and mobile phone numbers. Every defined mobile learner **MUST** have a defined mobile device type in order to receive assignments. And unique phone numbers – especially a person's mobile number – are one of the key user-specific attributes used to authenticate *CellCast Users* whenever accessing the *CellCast Server* especially when the User/Learner is "phoning in" to hear an assignment or the *CellCast Server* is "phoning out" to a User/Learner with a just-in-time pushed announcement or assignment. To further assist in platform flexibility and organization, Administrators are encouraged to define group, job role or location-specific "containers" to streamline information flow and improve reporting and analysis. This documentation will assist you in learning how to manually create new CellCast accounts as well as how to launch a specialized *CellCast User Creation Wizard* designed to simplify and streamline the process you'll need to follow in order to create new accounts for your mobile learners.

2. **Planning Message-based Content (Levels 1-2)**. The simplest form of CellCast content delivery is one-way or two-way message-based content which allows you to define, assign and distribute targeted emails to a CellCast User's computer or smartphone, or to send SMS/text messages to a CellCast User's cellular phone. One-way messages are ideal for things like alerts or announcements; two-way messages (SMS only) are ideal for things like community polls, quick surveys, short tests or even basic information gathering tasks. Be aware that while email-style messaging is free (to both send and receive), SMS-based one-way notifications and two-way message campaigns are chargeable actions and your organization will incur nominal transactional fees for every message sent and received by the CellCast Server.

   > *TIP: It is important to denote that most mobile learners will be charged for all SMS messages sent and received from the mobile phones by their service provider/carrier. On the other hand, most email communiqués sent to users are seen and dealt within a time period measured more easily in hours versus SMS messages which are seen and dealt within a time period normally measured in minutes. So, if it's important, it might be better to use chargeable SMS services instead of emails for learning communiqués.*

3. **Planning Voice-based Content (Level 3)**. Voice-based CellCast assignments – which work with virtually every mobile phone – can include any combination of audio-based or message-based content you desire. The most popular and flexible form of a CellCast Basic Session is a voice-based assignment typically presented as an audio-based podcasts, spoken word/narrative content, and audio-based test or survey. There are several ways to plan and prepare audio-based content from diverse sources such as (1) recorded materials pulled

from training courseware, marketing communications, sales conference calls and tradeshow sessions, (2) packaged content purchased from third party sources, and (3) information recorded internally using simple content creation tools including inexpensive desktop microphones or even your telephone. Uploaded audio files become voice-based "*Learning Nuggets*" and can be created in any length although content running two to seven minutes is more typical. We strongly encourage you to record a spoken word title clip for each *Learning Nugget* you plan to manage in the *CellCast Server* which simplifies content selection for CellCast Users accessing the system from any basic mobile phone. Finally, all voice-based content you plan to deliver using CellCast Phone-In or Phone-Out functionality must be saved in a lower resolution phone-friendly format (files must be 8 KHz, 16-bit, mono WAV or GSM audio files).

> **NOTE**: *For more information on how to create new audio content or repurpose your existing podcasts, MP3 or WAV files, please refer to OnPoint's Support Site and enter "Record Audio" into the OnPoint Knowledge Base.*

This documentation will assist you in learning how to use manually create CellCast learning **Nuggets** for voice-based content and also how to launch specialized *CellCast Wizards* designed to simplify and streamline the process you'll need to follow in order to create new audio-based **Nuggets** for your mobile learners.

4. **Planning Media-based Content (Levels 4-6)**. Mobile learners equipped with advanced smartphones or other data-enabled mobile phones can receive CellCast assignments (with integrated assessments) containing a variety of standard and rich media content that make the mlearning experience more interesting and engaging.

   a. Standard Media Content. The most common forms of standard media-based *Learning Nuggets* are simple text pages, formatted HTML pages and Adobe PDF documents.

   b. Rich Media Content. The most common forms of media-based *Learning Nuggets* are short video segments, audio podcasts, slide presentations/PowerPoint-style content and integrated training modules containing mobile friendly text and image pages. In select cases, content developers can prepare and distribute mobile friendly *Flash* or *Flash Lite*-based clips though careful regard must be taken to ensure each user's mobile device can support *Flash.*

   > **NOTE**: *most mobile devices do not provide support for Flash content though many newer, higher end smartphones will begin supporting Flash content in 2010 provided the device OEM supports Adobe's new Flash Player v10.1; this would expand Flash support to newer Android, Windows Mobile, BlackBerry and Nokia devices but not Apple iPhones or iPod touch Media Players.*

This documentation will also assist you in learning how to use each of the advanced *CellCast Wizards* designed to simplify and streamline the processes you'll need to follow in order to create new standard and rich media-based Learning **Nuggets** from existing digital materials you most likely already have in your training content libraries. Specialized CellCast Wizards include the ability to (1) create/edit textual content into mobile-friendly content, (2) convert existing Microsoft *PowerPoint* presentations into a mobile-friendly content, (3) transcode

existing rich media video (and audio) files into mobile-ready clips optimized for delivery and playback to specific mobile devices.

5. **Preparing Tests/Surveys (Levels 2-6)**. Finally, if you're familiar with the content you intend to deliver, you should draft a written version of any tests/assessments or feedback forms/surveys you want to include at the end of any voice-based content or as a standalone interactive survey delivered using SMS messaging. For these assessments, you can elect to use any of five (5) supported question types including *True/False*, *Multiple Choice/Single Answer*, *Numeric Response* (an integer value), *Likert* (rating scale) and *Essay* (spoken word/recorded message or short texted responses) questions. For voice-based assessments and surveys, question text typed into the CellCast Server can utilize a text-to-speech converter to transform text phrases into synthesized audio. Alternatively, we encourage administrators to record/provide separate audio files for each question and answer series – this practice yields improved results by delivering your assessments in a natural voice rather than a computer-generated experience. All recorded questions should be produced in the same format as your other voice-based content as outlined in item "**b**" above.

> **NOTE:** *This documentation will also assist you in learning how to use an advanced **CellCast Assessment Creation Wizard** to simplify and streamline the processes you'll follow to create mobile-friendly tests or surveys delivered to your mobile community.*

Typical CellCast Implementation Tasks

After completing your planning and careful consideration of the type and volume of content you wish to deploy to your mobile learning community, you're ready to begin organizing and importing your gathered information into the *CellCast Server*. The following sections of this **CellCast Administration Guide** are divided into thirteen (13) sets of implementation tasks that Administrators need to follow to prepare and deploy CellCast assignments for their mobile learning communities. These implementation or process task lists include the following:

Section A: General Tasks:

1. Creating CellCast User & Manager Accounts
2. Organizing CellCast Content using Categories
3. Making CellCast Assignments

Section B: "CellCast Basic" Implementation Tasks:

4. Message-based Alerts & Notifications (Level 1)
5. SMS-based Message Campaigns (Level 2)
6. Voice-based CellCast Content (Level 3)
7. Assessments with CellCast Content (Levels 2-6)

Section C: "CellCast Advanced" Implementation Tasks:

8. Text-based CellCast Content & Nugget Wizard (Level 4)
9. Mobile Web Modules & Course Wizards (Level 5)
10. PowerPoint-based CellCast Content (Level 5)
11. Transcoding Media Files for Mobile Delivery (Level 6)
12. Audio-based CellCast Content (Level 6)
13. Video-based CellCast Content (Level 6)

Please select the appropriate sections and refer to the specific implementation tasks that meet the business objectives based on your unique mobile learning environment and/or organizational requirements. Some organizations will only use a few of these available tools while others will (eventually) utilize most or all of them to reach their mobile learning communities. Remember to review these implementation tasks periodically as your organization's mobile learning needs grow/evolve based on changing business requirements or as new mobile devices are introduced to your mobile learners or knowledge workers.

Section A: General Tasks

1.   Creating CellCast User & Manager Accounts

There are several different ways to create and manage CellCast User accounts and credentials on your *CellCast Server*. For CellCast pilots and preliminary deployments, the two most common ways to update the CellCast database with your target user population are: (1) an assisted account creation using the *CellCast User Creation Wizard* performed by any CellCast Administrator or system evaluator and (2) manual account creation performed by an experienced CellCast Administrator. In addition, a few other alternative account creation processes are available including (3) the automatic importation of predefined user accounts populated into a standard Microsoft Excel-based import template, and (4) via an online Self Registration Form using a customized URL/Web Site (available as part of any formal CellCast Pilot Program). Customers and Partners with "full production" CellCast installations are more likely to use other automated methods to manage and synchronize their user accounts and credentials including LDAP, Microsoft Active Directory integration or some other custom web services/WSDL or REST-based connectors.

Wizard-based Account Creation Option (Evaluators & New Administrators)

We recommend new or inexperienced CellCast Administrators use the *CellCast Account Creation Wizard* to generate new CellCast User/Learner accounts. While this approach utilizes a limited number of user-specific fields, it greatly simplifies the setup process and allows new CellCast system evaluators and partners to create user accounts without having to learn many of the nuances of the CellCast platform.

To use the *CellCast Account Creation Wizard*, log into OnPoint's Course Manager application ("OPCM") as a Site Administrator or Content Administrator using the provided web address (see your Portal Quick Start Guide for more details and addresses). If you have Root Administrator access to a dedicated server or an enterprise license, you'll also need to select the proper "Working Customer" / "Slice" where you want to define and deploy your new CellCasts.

1.   Select the **Users & Groups** button from the top level menu, then select **Users & Managers** from the drop down list and you'll be presented with the *User/Learner Table* atop of which you'll see three action buttons ("Add User", "User Wizard" and "Mobile User Wizard". Click the Mobile User Wizard button to initiate the creation process for the new User/Learner account you want to build (see Figure 1 on next page).

2.   Provide responses for each of the displayed fields as follows:
    a.   **First Name –** The person's given name. Used as a secondary key field used for system reporting.

    a.   **Last Name** – The person's family name. Used as a primary key field used for system organization and reporting.

b. **Email Address** – Used to send out results or announcements via email if opted in.

c. **Login ID** –This can either be the email address again or some other unique, easy to manage/remember combination like *firstname.lastname*. If you plan to deploy CellCast Advanced features, shorter Login IDs are recommended.

d. **Password** – For CellCast Basic instances, these generally are not used (since caller-ID serves as the primary authentication key. Depending on your *InfoSec* requirements, these passwords can be easy/short or hard/complex. Passwords are required for every CellCast Advanced user account and may be simple or forced complex depending on how your *CellCast Server* has been configured by the Administrator.

e. **Password Hint** – Defined hints can be provided to CellCast Users when they have trouble accessing the optional *CellCast Server* web portal.

f. **Title** – Optional field requests the new user's job function or business title.

g. **Organization** – Optional field that defines the company or entity the new user is affiliated with. This is typically where someone works.

h. **User Time Zone** – Needed to help schedule/coordinate all callout-oriented CellCast assignments. Select from the available list of applicable time zones.

i. **System Role** – Generally set to "User" or "Learner" for active CellCast accounts. If the account you are creating is for a manager or supervisor, contact the ***CellCast Support Team*** to learn about the differences between all other available system roles.

j. **Telephone Country Code** – Select the country of residence for the CellCast User you are defining. If you select "United States/Canada" from the dropdown list and the person is in Canada, make sure you select "Canada" from the secondary dropdown.

k. **Telephone Mobile** – Essential field which contains the User's 10-digit or 11-digit mobile number or another unique phone number (e.g., home, DID office line). You can enter these numbers with or without the punctuation/dashes (e.g., "912-555-5555" or "912555555"). DO NOT INCLUDE COUNTRY CODES.

l. **Phone/Device** – This selection allows you to pick a selection from the list of available mobile device types; this ensures all CellCast assignments and user interfaces are delivered in the proper device-specific formats.

Figure 1 – Mobile User Wizard

3. Once all requested fields have been supplied, click the Create User button and the new account will be generated.

> **TIP**: If you are creating several accounts with similar responses for each of the displayed fields, click the Create & Continue Series button to auto-populate all standard fields from your first entry and begin creating another user account for the same organization.

4. After the new CellCast account has been saved to the database, you'll be presented with the standard CellCast User Information screen where Administrators can update/edit a User's profile, make assignments, associate groups or locations, etc (see Figure 2). Please refer to the *General Tasks: Making CellCast Assignments* section of this **Administration Guide** for complete details on how to perform these actions.

Figure 2 – CellCast User Information/Edit Screen

Manual Account Creation Option (for experienced Administrators)

To create CellCast Users manually, log into OnPoint's Course Manager application ("OPCM") as a Site Administrator or Content Administrator using the provided web address (see your Portal Quick Start Guide for more details and addresses). If you have Root Administrator access to a dedicated server or an enterprise license, you'll also need to select the proper "Working Customer" / "Slice" where you want to define and deploy your new CellCasts.

1. To create/define Users, log into OPCM, select the **Users & Groups** top level menu, and then select **Users & Managers** from the drop down list. Click the Add User or Add Manager button (depending on the type of account you are establishing and enter all relevant information for that User/Manager.

    <u>User Information Sub-menu/Tab</u>

    Creating an account for a CellCast User requires a minimum of user-specific fields to be populated including each of the following:
    a. **First Name** – The person's given name. Used as a secondary key field used for system reporting.

    b. **Last Name** – The person's family name. Used as a primary key field used for system organization and reporting.

    a. **Email Address** – Used to send out results or announcements via email if opted in.

    b. **Login ID** –This can either be the email address again or some other unique, easy to manage/remember combination like **firstname.lastname**. If you plan to deploy CellCast Advanced features, shorter Login IDs are recommended.

    c. **Password** – For CellCast Basic instances, these generally are not used (since caller-ID serves as the primary authentication key. Depending on your *InfoSec* requirements, these passwords can be easy/short or hard/complex. Passwords are required for every CellCast Advanced user account and may be simple or forced complex depending on how your *CellCast Server* has been configured by the Administrator.

    d. **Password Hint** – Defined hints can be provided to CellCast Users when they have trouble accessing the optional *CellCast Server* web portal.

    e. **User Time Zone** – Needed to help schedule/coordinate all callout-oriented CellCast assignments. Select from the available list of applicable time zones.

    f. **Telephone Country Code** – Select the country of residence for the CellCast User you are defining. If you select "United States/Canada" from the dropdown list and the person is in Canada, make sure you select "Canada" from the secondary dropdown.

    g. **Telephone (Mobile)** – Essential field which contains the User's 10-digit or 11-digit mobile number or another unique phone number (e.g., home, DID office line). You can enter these numbers with or without the punctuation/dashes (e.g., "912-555-5555" or "912555555"). DO NOT INCLUDE COUNTRY CODES.

h. **System Role** – Generally set to "User" or "Learner" for active CellCast accounts. If the account you are creating is for a manager or supervisor, contact the ***CellCast Support Team*** to learn about the differences between all other available system roles.

i. **Preferred Language** – This selection ensures all CellCast assignments and user interfaces are delivered in the proper localized formats.

j. **Notifications –** This function serves as the formal "opt-in process" for CellCast User accounts for all Email and SMS deliveries and also allows triggered messages to be sent to each registered user account.

Assignments Sub-menu/Tab

k. Utilize this function to assign predefined CellCast content to new (or existing) CellCast Users. **All CellCast-style content is packaged and displayed under the "Course Assignments" and "Nugget Assignments" section headings. ALSO, COURSES CAN ONLY BE ASSIGNED TO MOBILE USERS WITH SMARTPHONES.** To assign a Mobile Course or Learning Nugget to a User, click on the **Assign** link directly to the right of the respective category section heading and a typical OnPoint "Opposing Table Display" will appear featuring a list of Available Courses/Nuggets on the right side and a list of Assigned Courses/Nuggets on the left side. Select the item (or items) you wish to assign your CellCast User to by marking the "checkbox" and then click the Assign/Unassign button between the two tables; you may assign as many CellCast Courses or Nuggets as needed in one action. Click the Finished button to complete your assignment(s).

> *Note: If you have a number of Users to assign Courses and Nuggets to, this iterative approach may prove laborious and you may wish to simply assign a net of CellCast Nuggets to a defined Group, Job Code, Location or Skill Profile instead*

Memberships Sub-menu/Tab

l. Associating each *CellCast User* to one or more predefined *CellCast Groups* may make it easier to assign mobile content. For each individual User account, click over to the **Memberships** sub-menu/tab and, under the first section called Group Membership, click on the **Assign** link and a typical OnPoint "Opposing Table Display" will appear featuring a list of Available Groups on the right side and a list of Assigned Groups on the left side. Select the Group you wish to assign your User to and click the Transfer button between the two tables; you may choose to assign a User to multiple Groups here as well. Click the Finished button to complete your Group assignment(s). Repeat this same process if you'd like to associate the new CellCast User with a predefined Job Code or Location assignment as well. Finally, click on one of the User's Group or Job Code assignments in order to make that **Group** or **Job Code** their "**Primary Group**"; this designation affirms who their immediate supervisor is and how notifications specific to their **Nugget** progress will be treated and routed.

Mobile Profile Sub-menu/Tab

m. Finally, complete the User profile by selecting the **Mobile Profile** sub-menu/tab for the User you are defining. Click the Add New Device link in the "Phone Types/Devices section, pick a selection from the list of available mobile device types, and click the Save button to commit your selection.

After your CellCast Users have been created, it is time to prepare, organize and create your CellCast content and ready it for assignment to your mobile community.

2.   *Organizing CellCast Content Using Categories*

Before defining and uploading your CellCast content, we recommend that you create a new Category in Course Manager where you can store all of your new content, assessments, etc. Categories assist you in organizing all your CellCast learning nuggets and assessments, and provide a quick way to filter and find content in the future.

1. To create a Category, access OPCM/Course Manager and go to the **Administration** top level menu then select **Categories** from the drop-down list of selections. We encourage you to create and use a variety of categories to help organize your content and improve reporting and analysis. Examples of typical categories include terms like "Human Resources", "Sales" and "Product Demos" (see Figure 3). To edit an existing **Category**, click the Category Name which is presented as a web link.

ADMINISTRATION: CATEGORIES			
Add Category			
Category Name	Description	Default	Status
Acme Product Demos	Sample category for entry materials for "Assessment Go Mobile with CellCast" presentation.	N	Active
Carlson Marketing (Canada)	Sample content for Carlson evaluation.	N	Active
Change & Innovation	Change & Innovation	N	Active
Clickatell CSC Application		N	Inactive
Common Short Code Demos	Demonstration content for CSC	N	Active
Corporate	Courses related to the history, organization, and policies of Acme Corporation.	N	Active
Customer Service		N	Active
Field Service	Sample content for field service personnel	N	Active
General	Default category	Y	Active
General-Sales	Default category	N	Active
Human Resources		N	Active
Pharmaceutical Marketing	Pharmaceutical Marketing	N	Active
Strategy & Tactics		N	Active
TrialGraphix Demo		N	Deleted
14 listed			

Figure 3 – CellCast Category List

2. To create a new category, click the Add Category button, define your new Category with a name and short description, then click the Save button to activate your entry (see Figure 4).

Figure 4 – Create/Edit a Category

3. Making CellCast Assignments

If you've just created a new CellCast account and/or wish to associate your new User/Learner with an **existing** CellCast learning **Nugget** assignment (e.g., existing content or any demo content provided by OnPoint with your system), there are two options you can follow as an Administrator: (1) you can log into the OnPoint *Web Manager* ("OPWM") interface and use a drag & drop interface to assign Nuggets and Courses to all Users you manager, or (2) you can log into OnPoint *Course Manager* ("OPCM") and follow the instructions found in this section. Typical CellCast-style assignments include mobile-ready **Courses**, learning **Nuggets**, and **Skill Profiles**. Since newly created user accounts have just been defined, no assignments will be displayed to start with.

Assigning Content Using OPCM

For experienced Administrators (or LMS customers), OnPoint's Course Manager application provides the most flexible way to make or update assignments to your mobile workers. Follow these instructions to make new assignments:

1. log into OPCM, select the **Users & Groups** top level menu, and then select **Users & Managers** from the drop down list and a complete listing of all defined CellCast User/Learner accounts will be displayed in alphabetical order by last name (see Figure 5).

Figure 5 – User/Learner List

2. Locate the specific user account you wish to update utilizing either the quick alpha filter or standard Filter button functions as needed and select the user and "click to select" that user

by clicking on the displayed link in the "User Name" field of the *Users & Groups: Users* table. Once selected, the screen shows a detailed, multi-tab display for the selected account along with several action buttons like "Edit", "Assignment Status", etc. (see Figure 6).

3.
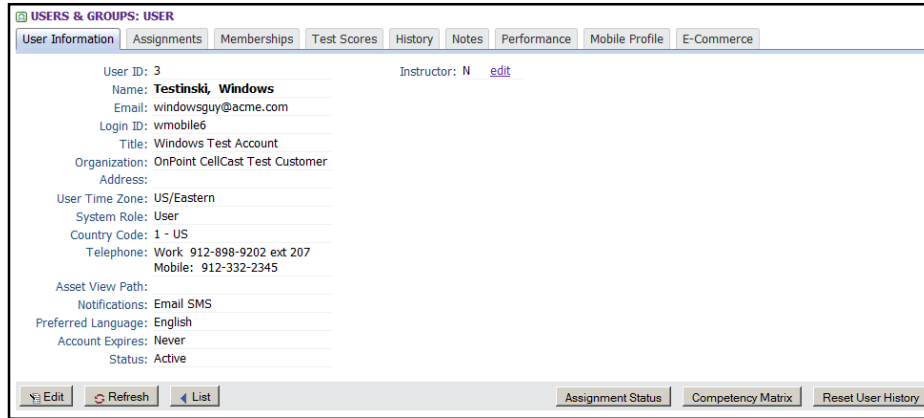
Figure 6 – User Account Update/Edit Screen

4. Select the "Assignments" Sub-menu/Tab located directly to the right of the "User Information" Tab and begin assigning as needed (see Figure 7).
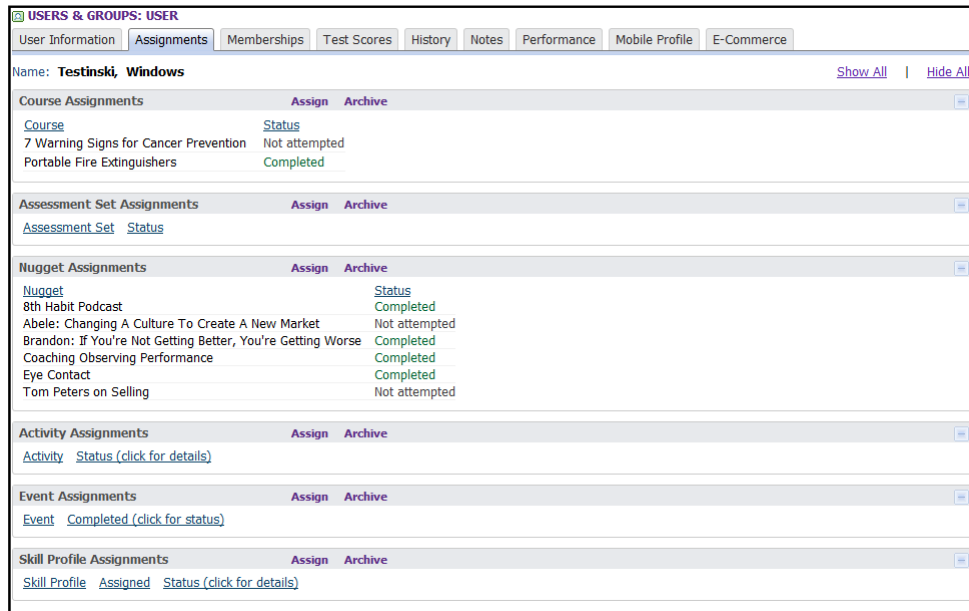

Figure 7 – Assignment Sub-Menu/Tab

All assignments are organized by **Learning Object** into a series of sections as shown above in Figure 7, and described in the Table below:

Element	Description
Course Assignments:	Indicates which Courses the user is currently assigned to take, along with the Completion Status of each. Click the **Assign** link to add new mobile-friendly Course assignments.
Assessment Set Assignments:	NOT CURRENTLY USED IN MOBILE/CELLCAST ONLY INSTALLATIONS. Indicates which standalone Assessments the user is currently assigned to take, along with the Completion Status of each. Click the **Assign** link to add new Assessment Set assignments.
Nugget Assignments:	Indicates which learning Nuggets the user is currently assigned to take, along with the Completion Status of each. Click the Assign link to add new Nugget assignments.
Activity Assignments:	NOT CURRENTLY USED IN MOBILE/CELLCAST ONLY INSTALLATIONS. Indicates which Activities the user is currently assigned to complete, along with the Due Date, Completed Date, and Status. Click the **Assign** link to add new Activity assignments.
Event Assignments:	NOT CURRENTLY USED IN MOBILE/CELLCAST ONLY INSTALLATIONS. Indicates the Events in which the user is currently assigned to participate, along with the Date of the Event and Approval status. Click the **Assign** link to add new Event assignments.
Skill Profile Assignments:	Indicates which Skill Profiles the user is currently assigned to, along with details including Started, Status, Completed, Date Expires, Maximum Time, and Used Time. Click the **Assign** link to add new Skill Profile assignments.

Table 1: User and Groups Assignments Sub Tab Page

All user assignment fields can be updated at any time with new or updated assignments. No "Edit" button is required to update the assignment fields of a User record.

5. **Making Course Assignments.** Course assignments (if previously defined and published) are made by clicking the displayed Assign link to the right of "Course Assignments" caption; an opposing table display is shown detailing previously completed assignments in the left-side column and available Course assignments displayed in the right-side column. Click the checkbox(es) next to the desired course(s) from the right-hand column (it is possible to assign more than one Course at a time). Click the Assign / Unassign button to commit the selected assignments then click the Finished button at the top left to commit your selections and return to the "Assignments" sub-tab/menu screen (see Figure 8).
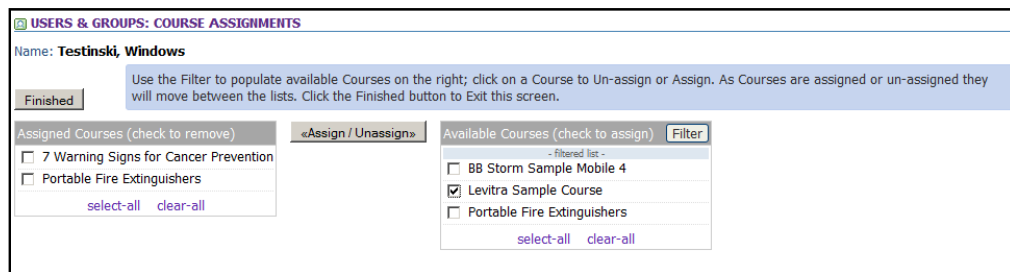

Figure 8 – Opposing Table Display for Assigning Courses

6. **Make Nugget Assignments**. Nugget assignments (if previously defined and published) are made by clicking the displayed Assign link to the right of "Nugget Assignments" caption; an opposing table display is shown detailing previously completed assignments in the left-side column and available Nugget assignments displayed in the right-side column. Click the checkbox(es) next to the desired course(s) from the right-hand column (it is possible to

assign more than one Nugget at a time). Click the Assign / Unassign button to commit the selected assignments then click the Finished button at the top left to commit your selections and return to the "Assignments" sub-tab/menu screen.

7. **Make Skill Profile Assignments**. Skill Profile assignments (if previously defined and published) are made by clicking the displayed Assign link to the right of "Skill Profile Assignments" caption; an opposing table display is shown detailing previously completed assignments in the left-side column and available Skill Profile assignments displayed in the right-side column. Click the checkbox(es) next to the desired Skill Profile(s) from the right-hand column (it is possible to assign more than one Skill Profile at a time but not recommended). Click the Assign / Unassign button to commit the selected assignments then click the Finished button at the top left to commit your selections and return to the "Assignments" sub-tab/menu screen.

> *Tip: Once a **Skill Profile** is selected, it will be immediately assigned to the user, so be sure of your selection before you make it. It is especially important to be cautious here, because the assignment of a Skill Profile typically carries with it the auto assignment of numerous courses, events, etc.*

Section B: "CellCast Basic" Tasks

4.   *Message-based Alerts & Notifications (Level 1)*

This section provides some high level details on how to define and distribute message-based content using **Course Manager** to delivery concise training and improve overall communications between your organization and your extended mobile audience. The simplest form of mobile content delivery is via one-way/inbound electronic messages and there are two popular options for message delivery: short message service (all known as "SMS" or "text messages") and the more common electronic mail ("email"). The majority of all cellular phones support SMS provided the user has "text plan" from their carrier. The up to 140-character "texts" sent via this method are generally considered "high value" content by the recipient and actually read/responded to faster than any other form of mobile communiqué. Smartphones with "data plans" also have the ability to send and receive email messages; in fact, mobile email access is the primary business drive and ROI justification for most organizations seeking to provide smartphones to their mobile workforces and executives. Several different types of message-based content can be generated by the *CellCast Solution* platform including just-in-time alerts or updates (Level 1 type mobile content), short and personalized reminders based on triggered business conditions (also Level 1) as well as two-way interactive messaging campaigns for tasks including mobile surveys, opinion polls and short tests (all Level 2 mobile content). Message definition and delivery can be generically associated with any member of any defined group/location/job code or tied specifically to any defined piece of content, test or training program.

While "what's possible" with the *CellCast Messaging Engine* is highly varied and very flexible, typical message definition, delivery and management tasks performed by CellCast Administrators include the following:

A.   Ad Hoc Messages
B.   Standardized Triggered Messages
C.   Managing the Notification Queue
D.   Ad Hoc Triggers for Learning Objects
E.   Serialized Messages/Notification Series

A. Ad Hoc Messages

The easiest form of message-based content is the ad hoc message. This functionality allows an Administrator to author, generate and send a simple SMS or email message to any mobile learners who is a member of a defined object class in the **CellCast Server** database. For instance, send a message to every user who is a member of a specific Group, assigned to a specific **Course** or **Nugget**, assigned to a specific **Location**, etc. To generate an ad hoc message, follow these instructions:

1. Log into Course Manager with your CellCast Administrator credentials.

2. Select the "Notifications" option from the top dropdown menu and click the "Send Notifications" option to reveal up to seven different general object classes (see Figure 9) then choose a relevant option :
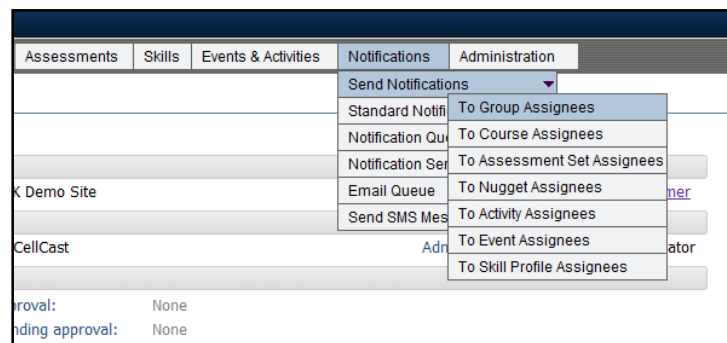
Figure 9 – Notification Dropdown Menu & Options

   a. To **Group** Assignees
      i. To send a message to all members of a selected **Group**, select the "To Group Assignees" option from the dropdown menu and select the "Notification: To Group" option; a new web form will appear (see Figure 10).
      ii. Select a defined **Group** from the dropdown menu; upon selection, a quick summary of the total number of intended recipients will be displayed including their preferred delivery modalities (one or more).
      iii. Enter a Title for your ad hoc **Group** message.
      iv. Enter the text of your ad hoc **Group** message. Email messages can be any length but SMS messages should be limited to 140 characters total; a character counter is displayed.
      v. Click the **Send** button to deliver your ad hoc **Group** messages to the Message Queue or **Cancel** to abort your action.

Figure 10 – Group Notification Template

b. To **Course/Nugget/Skill Profile** Assignees:

    i. To send a message to all mobile learners who have been assigned to an existing Learning Object (e.g., **Course**, **Nugget**, **Event**, etc.) select the appropriate option from the available choices (e.g., "To Course Assignees", "To Nugget Assignees") and the "Notification: Assigned to…" form will appear onscreen (see Figure 11).

    ii. Select a **Course/Nugget/Skill Profile/**etc. from the dropdown menu; upon selection, the quick summary of the total number of intended recipients will be displayed based on the total number of actual assignees to your selected Learning Object.

    iii. Enter a Title for your ad hoc message; this information is sent as part of the message you prepare.

    iv. Enter the text of your ad hoc message. Email messages can be any length but SMS messages should be limited to 140 characters total; a character counter is displayed.

    v. Click the **Send** button to deliver your ad hoc messages to the Message Queue or **Cancel** to abort your action.

Figure 11 – Generic "Learning Object" Notification Template

B. Standardized Triggered Messages

The most common form of *Level 1* message-based content are system-level alerts and instructions that are automatically generated based on pre-set triggers tied to predefined business rules. In general, triggered messages serve to inform the mobile learner (or their manager or supervisor) about the status of a current assignment mlearning assignment. One important process of preparing and bringing a *CellCast Server* platform online is the time spent updating and loading a series of messaging templates that are tied directly to accepted business rules and training practices for your organization. For instance, a standard call-to-action template can be defined that notifies mobile learners each time a new content item has been assigned to them as well as setting expectations for how long it will take to complete that assignment. Other typical use cases for triggered notifications include (1) messaged confirmation that an assignment was completed and the score attained/recorded for an associated test, (2) date-sensitive reminders sent to mobile learners encouraging them to start or finish an incomplete assignment, or (3) a process escalation message sent to a manager detailing the fact that one of their direct reports did not complete an assignment on schedule or reporting that one of their direct reports failed an associated assessment with a score of "65".

The messaging templates are powerful and flexible yet easy to update and deploy. There are between 4 and 9 different triggered conditions for each CellCast Learning Object class (**Course**, **Nugget**, **Activity**, **Skill Profile**, etc.). Each trigger supports conditional time-specific parameters (e.g., "n" days/hours before a condition is met, "n" days/hours after a condition is met, or immediately upon completion of a defined condition) and the delivery options include direct to user, direct to manager/supervisor, or direct to named account or email address.

 Default templates for all triggered messages are preloaded with every CellCast Solution platform and accessed/edited under the "**Notifications"** dropdown feature in **Course Manager** using the following instructions:

1. Log into **Course Manager** with your CellCast Administrator credentials.

2. Select the "**Notifications**" button from the top dropdown menu and click the "**Standard Notifications**" option to reveal up to six different general Learning Object classes (see Figure 12) and select a relevant option (a **Course**, **Nugget** or **Skill Profile** for mobile learning communities).
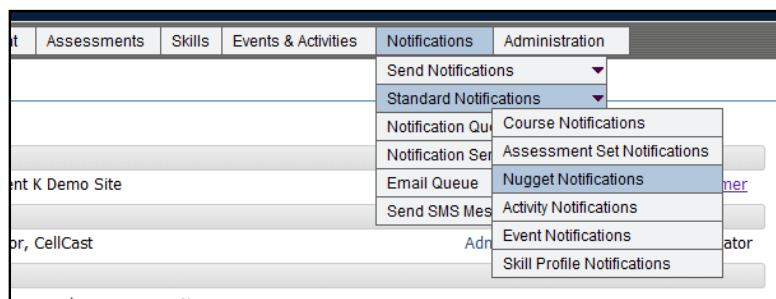
Figure 12 – Accessing Standard Notifications from Dropdown Menu

Example: A Standard Nugget Notification. Begin by selecting "**Nugget Notifications**" from the dropdown list of "**Standard Notification**" options and a new page will display titled "Notifications: Learning Nuggets" with a dropdown list containing eight options and an action button. Select the "**Assigned-To-Nugget**" and click the "**Add**" button (see Figure 13).
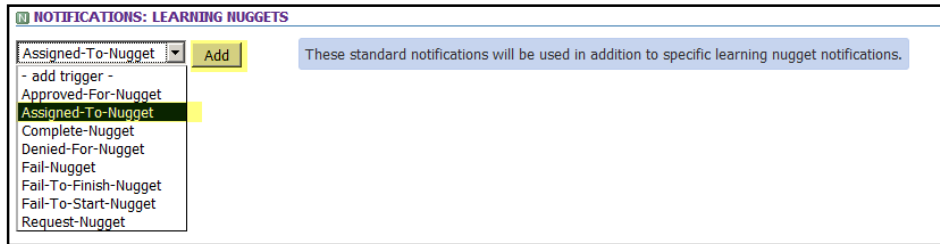
Figure 13 – Dropdown Selector for Available Nugget Triggers

For standard messaging templates, the only option is an "**Add Action**" and, when clicked, will allow you to define/update the default message template that will be sent to every mobile learner whenever the triggered condition is met (unless overridden for any specific Learning Object); click the **Notification** link (see Figure 14) and the default message template will appear in a new "**Trigger Notification**" popup window which can be updated/edited to meet your specific business rules (see Figure 15).
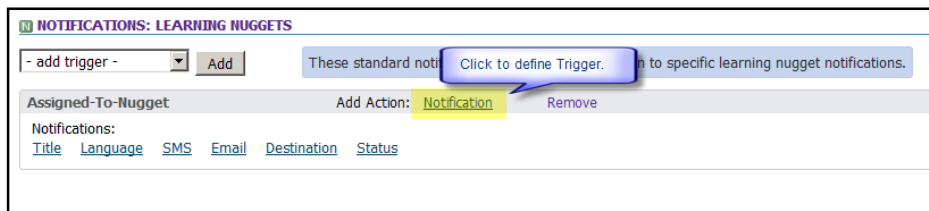
Figure 14 – Link to Define a Standard Notification
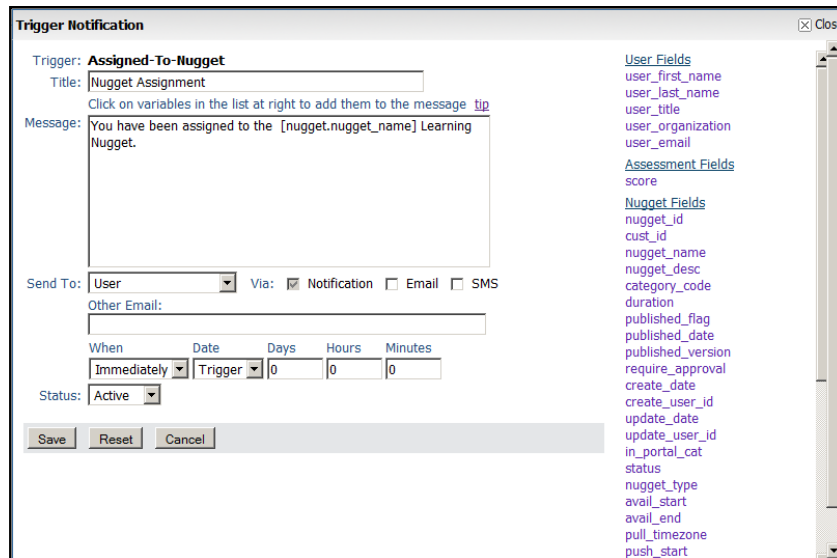
Figure 15 – Trigger Notification Template

3. Feel free to edit/update the default "**Title**" field as it should appear for all future notification messages tied to the standard Nugget Notification you are defining.

    Tip: It is possible to insert one of the available field variables into the Title field by inserting it into the main Message body and using cut/paste to move your variable into the Title field.

4. Edit/update the "**Message**" field with appropriate text and inserted field variables ensuring your message is "contextually applicable" so it makes sense to all future recipients who get assigned to this Learning Object. You can personalize the content for every message by selecting/adding any of the available conditional parameters listed on the far-right side of the template form by clicking the field identifier; selected fields are automatically copied into the body of the **Message** field.

    Tip: Be mindful that the total length of any template-generated message needs to be less than 140 characters in length if the intended delivery method is to be by SMS. Also, avoid using special characters like "%" or "&" when defining SMS messages because these cause the message to do format properly.

5. Update the "**Send To**:" field. Choose the intended target recipient for the triggered message you are defining by selecting it from the four options displayed in the dropdown menu. If the message goes to the User, select "**User**" or if the message should be sent to the User's direct manager/supervisor, select "**Manager**". Alternatively, you can specify the notification should be sent to the defined email address associated with each mobile learner's **Primary Group** or to any supplied email address for all users (see Figure 16).
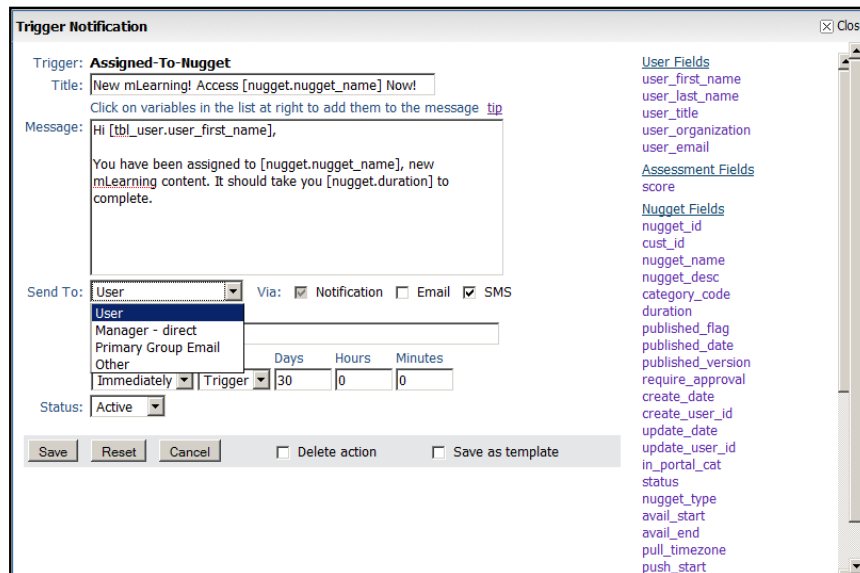
Figure 16 – Notification Template "Send To" Options Dropdown

6. Update the "**Via**:" field by ticking the appropriate checkboxes to define the preferred message delivery method(s) to be used for your standard notification message.

7. Update **Time**-specific conditionals as needed. These parameters allow you to generate and send triggered messages based on count-backs from past dates, count-downs to future dates or immediately upon the condition being met. The example shown below (see Figure 17) will send a Learning Refreshment reminder to every User who completes a mobile learning **Nugget** assignment 90 days after they first complete it.

Figure 17 – Notification Template Delivery Timing Options Dropdown

8. **Save** and deploy your updated notification template. Once you have saved your template, it will automatically be applied and invoked for every **Nugget** assignment made to every mobile learner unless overridden manually at the Learning Object level (see below).

C. Managing the Notification Queue

All messages whether included as part of an ad hoc alert or as a triggered standard notification, are initially delivered to the CellCast Server's **Notification Queue** where they are stored until ready for delivery based on any defined time or date-specific business rules. In the event an Administrator needs to check or modify messages stored or managed in the Queue, they can access it from Course Manager and follow the instructions found below.

1. Select the "**Notification Queue"** option from the **Notifications** dropdown menu at any time to display a listing of pending (or already delivered).

   a. All messages are presented in reverse chronological order (see Figure 18).

   b. Filter to find messages generated for a specific User/Learner or based on delivery status as needed by filling in the search fields or selecting the proper options from the dropdown menus. Given there can actually be 1,000s of messages stored in the **Notification Queue**, you may wish to limit the total number of messages displayed in the table display as needed.

   c. Any time an Administrator generates a message using an internal CellCast function, that message will remain in the **Notification Queue** for a period of one to five minutes (based on your system configuration defaults) thus allowing an Administrator to delete any messages they may have accidently triggered before they are launched and sent.

Figure 18 – Generic "Learning Object" Notification Template

D. Ad Hoc Triggers for Learning Objects

Ad Hoc Triggers come in two types which are (a) generated messages and (b) automatic assignments. Both types are easy to establish and, once configured properly, generally self-managed and sustaining. In the former case, messages provide information in the form of an email or SMS text sent directly to the affected **User/Learner** or can be sent an updates or alerts to other affiliated parties (e.g., a person's manager, a subject expert, the administrator) and these messages can be populated with specific information (e.g., **User/Learner**'s test score on an assessment, a date related to a deadline). In the latter case, successful completion or completion failure for any given assignment can be used to trigger a follow-on or remedial assignment including another **Course**, **Nugget** or even an entire **Skill Profile**/learning path.

Let's start by looking at ad hoc messaging tied to triggers. There are often situations where using a **Standard Notification** template is not appropriate for the type of messaging you need to support a specific Learning Object. Since **Standard Notifications** are generated automatically, it is necessary to disassociate all defined standard notifications at the **Learning Object** level **BEFORE** assigning any mobile learners/users to that Learning Object. Once the Assignments for a **Course** or **Nugget** have been defined, Administrators may choose to define one or multiple ad hoc **Notifications** and tie them to triggered conditions to a specific Learning Object. All triggered Notifications are defined via the "Triggers" Sub-Menu/Tab and can be added either when a selected Learning Object is created or anytime thereafter.

> *NOTE: The assignment of a **User/Learner** (or **Group**, **Job Code** and **Location**) to any **Learning Object** will initiate and trigger the whole series of defined **Standard Notifications** for that Assignment; simply un-assigning a **User** after accidently assigning them will **NOT** reverse the "chain of triggered events" either so please be mindful and careful!*

Ad Hoc Trigger Conditions

Administrators can set up automated notifications based on Users/Learners that: (1) are newly assigned to that Learning Object (generally a Course or Nugget); (2) when requesting approval to take a specific Learning Object; (3) when approved to take a Learning Object, (4) when denied approval to take that Learning Object; (5) actions that happen when an assignee completes that Learning Object or (6) fails the Learning Object; when they (7) fail to complete the Learning Object or simply (8) fail to start the Learning Object. Triggers do not send Notification messages to Users/Learners who have already met any of the predefined conditions in the past – messaging only takes effect from the point that Trigger has been established moving forward.

Defining Ad Hoc Triggers & Notifications

Ad hoc messages for a defined Learning Object based on specific triggered conditions are easy to create, edit and deploy and are accessed via the "Triggers" Sub-Menu/Tab displayed at the Learning Object level. To include a new ad hoc Notification (or to exclude any Standard Notification) from a Learning Object and and/or create a new ad hoc message, log into Course Manager and use the following instructions:

1. Log into **Course Manager** with your CellCast Administrator credentials.

2. Select the **Learning Object** you want to define an ad hoc message by drilling down from the corresponding top dropdown menu and selecting the **Course**, **Nugget** or **Skill Profile** from the displayed table list; once selected, the **Learning Object** will display and the default view will present the General Information Tab for that Learning Object (see Figure 19).

Figure 19 – "Learning Object" General Information & Remaining Tabs

3. Next, click the "**Triggers**" Sub-Menu/Tab; any **Standard Notifications** that have already been defined at a higher system level will be displayed and indicated with a green Standard Notification label (see Figure 20).

Figure 20 – Pre-Assigned Standard Notifications for a Selected Learning Object

4. To supplement or override an existing **Standard Notification**, reselect and "Add" an offsetting "Trigger Action" that corresponds to the **Standard Notification** message you wish to supplement or replace. For example, to override the "Assigned to Nugget" **Standard Notification** shown in Figure 20, select the "Assigned-to-Nugget" from the *Trigger Action* dropdown and click the Add button (see Figure 21 below). When activated, a new Trigger Action will be displayed below the list of predefined **Standard Notifications** allowing the Administrator to either define a new message using **Add Notification** or define a new assignment using **Add Assignment.** Then, override the Standard Notification message for this trigger by toggling the **Override Standard: No** link to display **Override Standard: Yes** instead (see Figure 21 below).
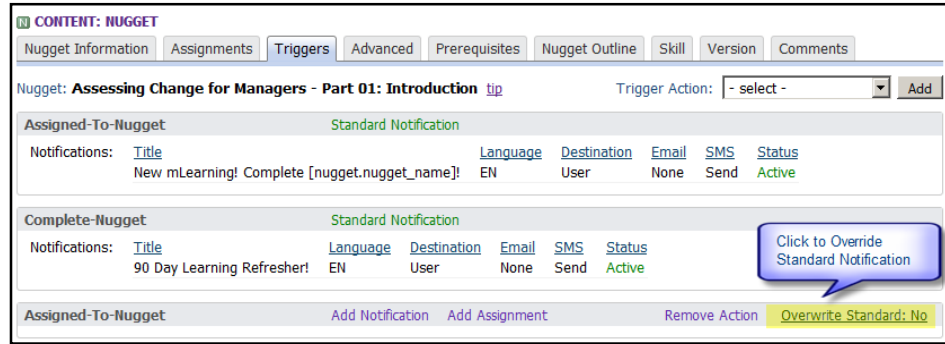
Figure 21 – Pre-Assigned Standard Notifications for a Selected Learning Object

5. As stated previously, Administrators can define ad hoc triggers for any **Learning Object** to send messages and/or generate new or remedial assignments based on attained or failed business rules (see Figure 22). To define an ad hoc message, click the displayed **Add Notification** link and populate the *Trigger Notification* web form that appears. Message template as previously explained in Section XX above.
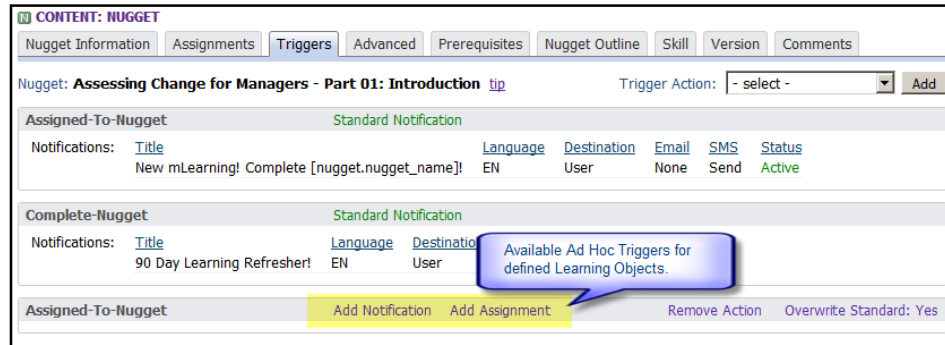

Figure 22 – Definition Links for Ad Hoc Triggers

6. To define a new or remedial assignment, click the displayed **Add Assignment** link and populate the displayed fields in the Triggered Assignment web form (see Figure 23) as outlined below:

Figure 23 – Trigger Assignment Template for Selected Learning Object

a. Select an **Object Type** – Typically a Course, Nugget or Skill Profile.

b. **Assigned** Learning Object - Select a **Learning Object** from the table display by clicking the link that corresponds to the item you want to assign. You can filter the table display using either by **Name** using the fill box and/or filter by **Category**; once picked, the name of selected **Learning Object** will appear in the Assigned field.

c. **Delay Assignment** – Define the number of days you wish to delay the new assignment from appearing to the User/Learner if desired: this functionality is ideal for setting up periodic training refreshers.

d. Set the **Status** – Defaults to "Active". Use the dropdown field selector to make this trigger inactive or to delete your selection.

e. Click the Save button to commit your update to the CellCast database; the new assignment will now be listed along with all other Standard Notifications and ad hoc triggers (see Figure 24 on the next page).

f. To remove a defined ad hoc trigger, click the **Remove Action** link next to the corresponding action.

Figure 24 – Collection of Triggered Conditions (Notifications & Assignments)

E. Serialized Messages/Notification Series

Serialized messages are actually specialized outgoing messaging campaigns sent to registered subscribers/mobile learners who have been assigned to a defined **Notification Series**. The most common Use Cases for serialized messages are (a) periodic knowledge reinforcements and/or reminders and (b) scheduled iterative content deliveries.

In the former case, CellCast Administrators can prepare, activate and deploy a battery of short message-based alerts and ticklers to help refresh or reinforce existing knowledge previously gained through another learning exercise. For example, every salesperson who attended the National Sales Conference in January spent valuable time learning about new company products and services but the knowledge they gained while attending that event slowly begins to fade with the passing of weeks and months. To help reinforce new knowledge about specific products or services, a Notification Series can be established to send out period message-based reminders to every Sales Conference attendee via email, SMS or both. The information is inbound (mobile terminated) only but serves to call the User's attention back to some important fact, statistic or product feature.

Scheduled, iterative serialized messages, on the other hand, are focused on new information delivery rather than concept refreshment or important reminders. In this scenario, mobile learners subscribe (or become subscribed by their manager/organization) and receive periodic learning content sent to all subscribers on a predetermined, scheduled basis (generally daily or weekly). Typical use cases include programs like "SAT Word of the Day", "TOEFL Phrase of the Week," "ESL Vocabulary Builder" and "Daily Sales Tips!"

Defining a Notification Series

Serialized messaging campaigns are powerful and flexible yet easy to update and deploy. Administrators need to define their message community, determine the schedule and frequency for content delivery, and then enter the needed messages to the serialized thread.

1. Log into **Course Manager** with your CellCast Administrator credentials.

2. Select the "**Notifications**" button from the top dropdown menu and click the "**Notification Series**" option to display a list of all defined serialized messages threads. Click the Add Notification button and a web form will appear where you can begin to define your new serial message thread (see Figure 25).

NOTIFICATION: NOTIFICATION SERIES

Name: Vocabulary Word of the Week

Description: This Notification Series sends a vocabulary word-of-the-day to all registered subscribers.

Send Via: ☑ Email ☐ SMS
Start Date: 8 / 14 / 2009 📅 (mm/dd/yyyy, leave blank to start series on the date users are assigned)
Start Time: 9 am : 00
Send Interval: Daily

[Save] [Reset] [Cancel]

Figure 25 – CellCast Notification Series Web Form

    a.   Provide responses to each of the displayed fields:

        i.   **Name –** Provide a short/descriptive name for your Notification Series.

       ii.   **Description –** Supply a detailed description of the purpose and structure for the Series; this information will likely be reviewed by other Administrators and will help you and them better manage existing content at a future date.

      iii.   **Send Via –** Determine the delivery method(s) you wish to employ to send out the messages included in your Series; your choices are via "**Email**", "**SMS**" or select both methods if desired.

      iv.   **Start Date –** Enter a date upon which the Notification Series will commence. Click the small calendar icon to launch a date selector popup window.

       v.   **Start Time –** Select the start time when the first message in the defined Notification Series will commence.

      vi.   **Send Interval –** Select the appropriate delivery interval from the drop down list. The available options range from choices that are better suited for several messages sent over the course of one day (e.g., every 15 minutes or every hour) or spread out over the span of a week or even calendar month.

    b.   Click the Save button to commit your defined Notification Series to the CellCast database; the details will now be displayed in the main screen.

3.   Next, you'll need to define and populate all of the individual messages you wish to include in your Notification Series. Click the **add message** link inside the "Serial Messages" box to define your first message; a new window will display (see Figure 26). If you've elected to send your serialized message as SMS text, you'll see the character length displays a running count of the total number of characters you've typed so you can determine if you've exceeded the 140-character limit of a single SMS message.

Figure 26 – Notification Series Message Creation Form

If you've elected to send an email instead of an SMS message, you need not worry about character length but may wish to step up from using plain text format for your email and use HTML tags and formatting instead. To accomplish this, either simply enter your tags/codes into the "Message Text" field or click the **rich text** link above that field to launch an embedded WYSIWYG HTML editor (see Figure 27).

Figure 27 – HTML Editor for Notification Series Messages

After entering your plain text or HTML message text, click the Save button to commit your updates and continuing creating the remainder of the messages in your Series.

4. The next step is to assign Users or Groups to your Notification Series. Click the **assign** link in the "Assigned Users" dialog box (see Figure 28). Select individual **Users** or assign a **Group** instead to ensure automatic inclusion by all future subscribers to this Notification Series. As soon as **Users** or **Groups** are assigned, the screen will take update to reflect how many Users have been specified to receive the scheduled messages.
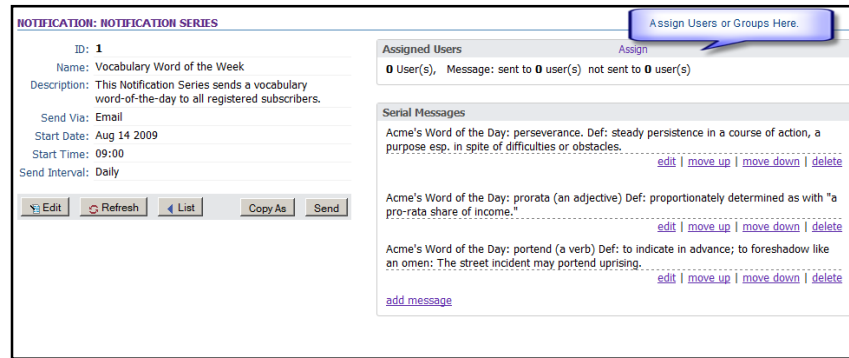
Figure 28 – HTML Editor for Notification Series Messages

5. At the time your Users (or Groups) are associated with a defined Notification Series, all messages intended for those Users – be it later today, next week or even next year – are automatically generated and sent to a specialized Notification Queue where they will remain "waiting" for the designated Start Date, Start Time and calculated interval to pass. In essence, assigning someone to a Notification Series is a way to *future mail* them now for something that's going to happen at some point in the future.

5. Interactive Messaging Campaigns (Level 2)

This section provides some high level details on how to define and distribute interactive, 2-way messaging campaigns using OnPoint's **Course Manager** to delivery mobile surveys, polls and testing to your mobile audience. All 2-way messaging campaigns utilize **Short Message Service** (commonly known as "SMS" or "text messaging") and an associated **Common Short Code ("CSC")** if you're connecting with learners in North America or the more popular (and inexpensive) **Long Code** available virtually everywhere else in any country or on any carrier around the world. **Common Short Codes** are generally a 5 or 6 digit phone number that's registered and recognizable by service providers/mobile voice operators as a valid address for sending/receiving text messages.

*NOTE: Due to legal challenges brought by "patent trolls," CellCast customers located in the US, Canada or Japan must provide their own dedicated **CSC** to connect and manage all of their Level 2 messaging campaigns; once provisioned and provided, OnPoint can easily connect your CellCast Server to your CSC to support interactive messaging campaigns. 2-way messaging campaigns outside the USA, Canada and Japan are all easily handled using **Long Codes** which are typically just a dedicated standard nine-, ten- or eleven-digit phone number (depending on the country).*

To simplify the process of how to plan and implement an interactive messaging campaign, think of it as two separate components: (1) the "**Test**" you need to design/create and (2) the "**Campaign**" you need to deploy that serves up all of the predefined interactions you've defined to the assigned Mobile Learners or registered Mobile Participants in your target audience. All **Campaigns** are launched using a defined (and unique) "**Keyword**" that acts as the initial trigger that delivers the first question or comment in that message series (the **Test**). Each message includes the defined question as well as the expected response (e.g., "*Eating right and regular exercise are both good for your health. Text back a '1' for TRUE or a '2' for FALSE.*") and once the Learner's response has been provided (as a message reply) and sent back to the **CellCast Server**, it triggers the transmission of the

next question in the series until all included questions in the defined **Test** have been transmitted and expected responses for each question have been received by the **CellCast Server**.

The *CellCast Solution* platform uses a specialized form of **Nugget**, a standard OnPoint Learning Object, to define and manage all 2-way messaging interactions. Administrators define and assign available **Users/Learners** to their **Nugget** just as they would any other form of learning assignment, and also associate a typical OnPoint **Test** with that same **Nugget**. SMS-based assessments support five different question types (*True/False, Choice/Single Answer, Likert, Numeric Response and Short Answer/Essay*) and all questions assigned to an SMS **Test** will likely need to be slightly re-factored for message-based delivery; luckily, OnPoint provides a simple parser that helps to automate this task. Finally, as with 1-way messages typical for *Level 1* mobile learning delivery, all 2-way messaging campaigns are easily associated with any defined **Group/Location/Job Code** or can be tied specifically to any defined piece of content, test or training program.

> **NOTE**: *Two-way interactive messaging communications using **email** are currently not supported on the CellCast Solution platform at this time – only **SMS**-based messaging campaigns are supported.*

6.   *Voice-based CellCast Content (Level 3)*

This section provides some details on how to define and upload audio clips into Course Manager for your voice-based content. All audio files are stored in the OnPoint CellCast database as objects we refer to as "Assets".

1. To create an audio Asset, go to the **Content** top level menu selection and select **Assets** from the drop-down list. Click the Add Single File Asset button and complete the required fields that define your new audio Asset. We recommend that you provide a short but clear name for your Asset and enter a short but detailed description. Next, for the **Asset Type** field, choose **Audio** from the drop-down list; the **Asset File Type** should still be set to "Upload Asset File." Next, click the Browse button to locate the physical audio file you want to upload and the name/addressing will appear in the entry field. Select a **Category** from the drop-down list. We recommend you define the **Asset Size** for your audio clip as **Width**: 320 and **Height**: 120. [**NOTE**: *This is not the default value but will persist throughout your current session once defined the first time*.]

   Click the Save button to save the new audio Asset to the shared repository. Repeat this procedure for each of the audio Assets you wish to add to your CellCast Session(s) including any spoken word questions and spoken word nugget titles you may have prepared/recorded too.

2. Once all your **Assets** have been defined and uploaded, you'll need to define a **Page** in Course Manager which becomes the means of associating your asset file with the **CellCast Nugget** we'll create later. In Course Manager, a **Page** is a delivery mechanism used to manage defined **Assets** and assign them to a CellCast (or to other online e-learning courses and learning objects for our LMS/LCMS administrators).

3. To create a new Page, go to the **Content** top level menu selection and select **Pages** from the drop-down list. Click the Add Page button and complete the required fields that define your new Page. Supply information for all of the relevant fields including **Page Name** (Page Titles are not used), a short **Description** that may be helpful in identifying the Page in the future, and an appropriate **Category**. The remaining fields including **Background, Minimum Time** and **Page Type** are not used with CellCasts. Click the Save button to save your new **Page** to the shared repository.

4. Once you've created your CellCast **Page**, you'll need to assign the corresponding **Asset** file(s) to it. The lower half of the Content: Page screen contains an Assets section with an **Assign** link that, when clicked, displays another "Opposing Table Display" with a list of all available/unassigned **Assets** on the right and any defined **Assets** for your **Page** on the left.

> **NOTE**: *Click the* Filter *button if you need to narrow the range of displayed* ***Assets.***

Once you've assigned your selected Asset, click the Finished button to complete your Page definition.

We strongly recommend creating and assigning two audio Assets to every CellCast audio Page: (1) your CellCast content and (2) a Nugget Title Clip; the latter is a spoken word title for your CellCast Nugget and can include a very brief description of what that Nugget covers. For instance, the recording might say: "PodCasting & Learning, the first in our series of CellCasts from OnPoint University." These titles are played to CellCast users whenever they log into the CellCast Server and request to hear a list of their assignments. If you don't record and add a separate Asset for use as your CellCast Nugget Title, the CellCast system will automatically include a "text-to-speech" converted title using a server-generated voice.

7. *CellCast Assessments & Questions (Levels 2-6)*

One additional step in the preparation process for most Learning **Nuggets** may be to define any assessment or survey questions you wish to include with your published and distributed CellCasts, assign them to a **Test** and then associate it with a mobile **Course** or learning **Nugget**. You can approach this in one of two ways: (1) new Administrators can utilize the *CellCast Assessment Creation Wizard* to generate a basic test or survey or (2) experienced Administrators can define and finesse their assessments manually using standard system functions; either approach is fine.

Wizard-based Assessment Creation Option (Evaluators & New Administrators)

We recommend new or inexperienced CellCast Administrators use the *CellCast Assessment Creation Wizard* to generate new CellCast assessments they wish to assign to their **Courses** and **Nuggets**. While this approach utilizes a limited number of assessment-specific fields, it greatly simplifies the creation process and allows new CellCast system evaluators and partners to create fully functional tests and surveys without having to learn the many nuances of the CellCast platform.

To use the *CellCast Assessment Creation Wizard*, log into OnPoint's Course Manager application ("OPCM") as a Site Administrator or Content Administrator using the provided web address (see your Portal Quick Start Guide for more details and addresses). If you have Root Administrator access to a dedicated server or an enterprise license, you'll also need to select the proper "Working Customer" / "Slice" where you want to define and deploy your new CellCasts.

1. Select the **Content** button from the top level menu, and then select **Wizards** from the drop down list; a list of available CellCast Wizards will display. In the Assessments section, click the Assessment Wizard button to launch the creation process for the new learner account you wish to build (see Figure 30).
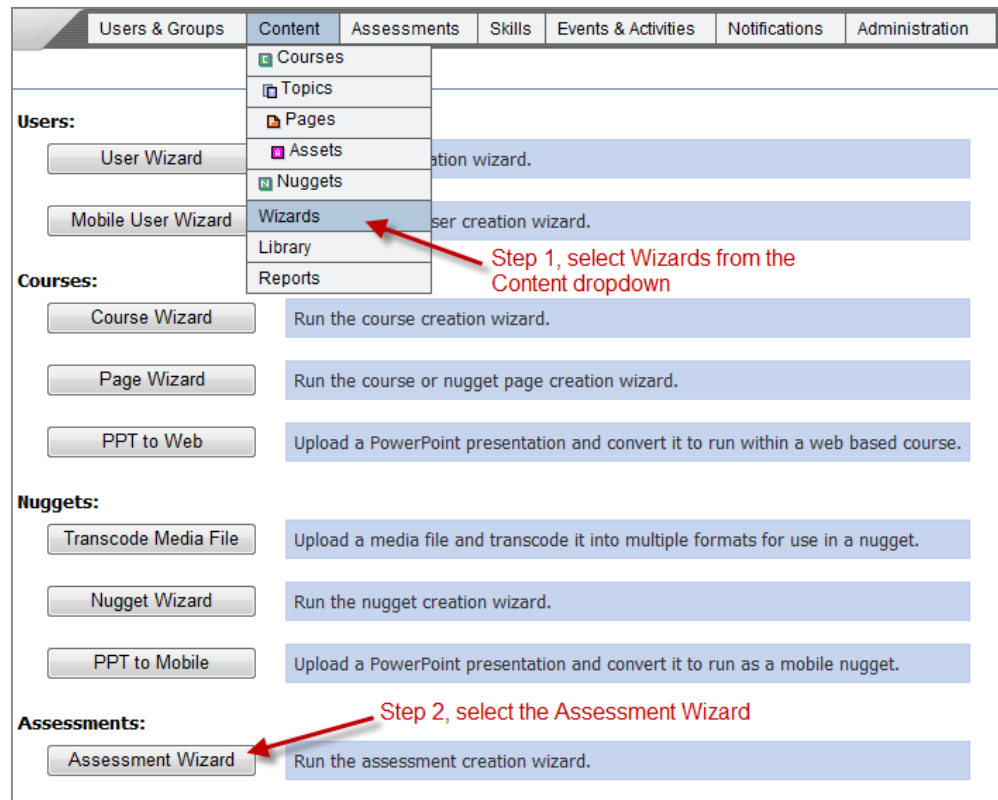
Figure 30 – Assessment Wizard Selection

2. Select the Mobile radio button, then provide responses for each of the displayed fields displayed in the *Assessment Wizard: Step 1 of 2* screen as follows:
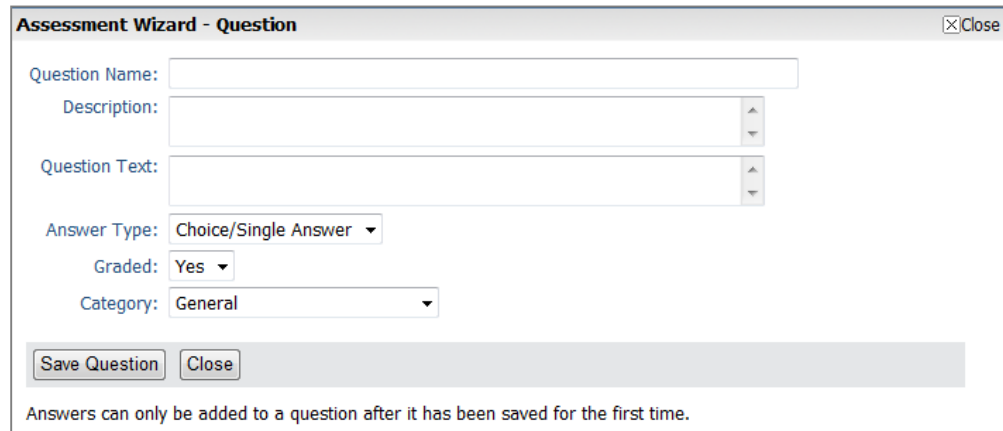
Figure 31 – Step 1 of the Assessment Wizard Process

a. **Assessment Name** – Provide a name for the test or survey you are creating. Shorter names are ideal and avoid punctuation or special characters. This is a required field.

b. **Test Message**– Provide the short set of instructions each mobile learner will see before beginning their assessment. It is generally a good idea to tell your Users/Learners how many questions comprise the assessment and how to best navigate through these questions. It is also a good idea to inform Users/Learners that they must answer all questions in an assessment before submitting it for grading/review.

c. Select a **Category** – To help organize your assessment for later review, select an existing **Category** from those listed in the dropdown menu.

d. Select an **Assessment Type** –The typical choice is the default, "Test" (which is always scored/graded and counts towards content completion) or you can also select "Feedback" or "Quiz" for a non-scored/graded effort.

e. **Passing Score** – Enter a numeric value that represents the "passing score" each User/Learner needs to attain in order to affirm their understanding of the content they've reviewed. For non-graded assessments, use "0".

After you've provided values for each field, click the Proceed to Step #2 button in the bottom right corner to continue to Step #2.

3. Defining the questions you'd like to include in your assessment on the Assessment Wizard: Step #2 of 2 screen by clicking the Add Question link and then providing responses for each of the displayed fields as follows:

Figure 32 – Step 2 of the Assessment Wizard

a. **Question Name** – Provide a short, descriptive name for each question you are adding to your defined assessment. To assist in identifying and managing your questions later, it is generally a good idea to use structured question name coding such as "HR-001" for your first HR-related question and "HR-002" for the second question, etc. Avoid using any special characters or symbols in your question names.

b. **Description** – Provide a short description for the question you are creating. This is not displayed to Users/Learners but may be helpful to others who might reuse this question in the future.

c. **Question Text** – Enter the question text displayed to Users/Learners when they are presented this question. It is a good idea to keep the text short and concise.

d. **Answer Type** - Select the answer type for the question you are defining from the available options in the dropdown menu. There are five (5) supported answer types for mobile learning Nuggets including "Choice/Single Answer" (most popular), "True/False", "Likert" scale, "Numeric Response" or "Essay"/open response.

> **NOTE**: *It is important to note that you can't change your mind and modify the answer type for any question you define after you've saved this information so make sure you pick the right option.*

e. **Graded** - Select whether you want all provided responses to be graded; the default is "Yes" but non-graded questions included in surveys may not need to be graded.

f. **Select the Category** - To help organize your assessment for later review, select an existing **Category** from those listed in the dropdown menu.

After you've provided values for each field, click the Save Question button in the bottom left corner to commit your inputs for this question.

4. Next, you'll need to define the individual answers (distracters) for the question you've just defined. Click the displayed **Add** link located at the bottom of the question detail screen and provide the following details:

   a. **Answer Text** – Provide the text for the answer you are defining.

   b. Determine if this is the **Correct Answer** – If this is the correct/expected response, select "Yes"; otherwise, leave the response as "No".

   c. Click the Save button to commit your answer text and continue entering possible answers/distracters until your question is complete.

   d. After you've completed defining your question and all possible answers/distracters, click the Save Question button and then click the Close button to return to the Test.
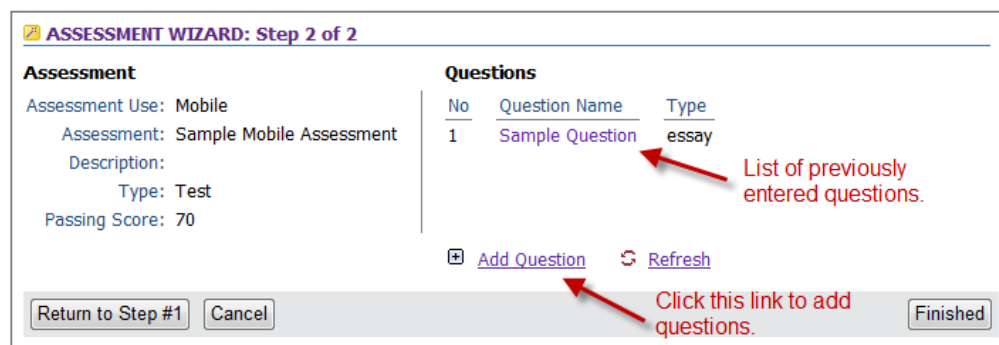
Figure 33 – Step 2 of the Assessment Wizard

5. Continue defining questions to your **Test** by repeating **Step #3** to **#4** above. When finished, click the Finished button to commit your full Test to the CellCast database. At this point, you'll be presented with a Test detailed information screen where you can edit or finesse anything you need (recommended for experienced CellCast Administrators only).
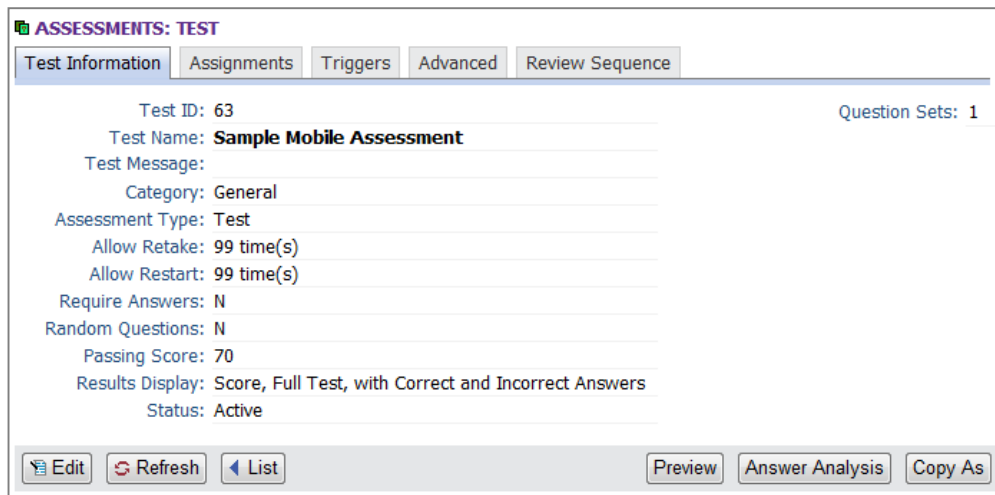
Figure 34 – Test Information Page

6. You are now free to assign your new **Test** to any mobile **Course** or learning **Nugget** following the appropriate instructions for that content type.

Manual Assessment Creation Option (Experienced Administrators)

Experienced CellCast Administrators can elect to define and generate new Tests manually using standard Course Manager features/functionality – the real advantage to this approach is the ability to repurpose existing testing materials previously created by other Administrators for use in either mobile or LMS/online test delivery. Experienced Administrators can elect to begin building new **Tests** either "top down" or "bottom up" depending on what sort of materials (tests, questions) are already defined and available in the CellCast database.

1. To create your test questions, go to the **Assessments** top level menu and select **Questions** from the drop-down list. Click the Add Question button and begin completing the required fields (See Figure 36 on the next page) as follows:
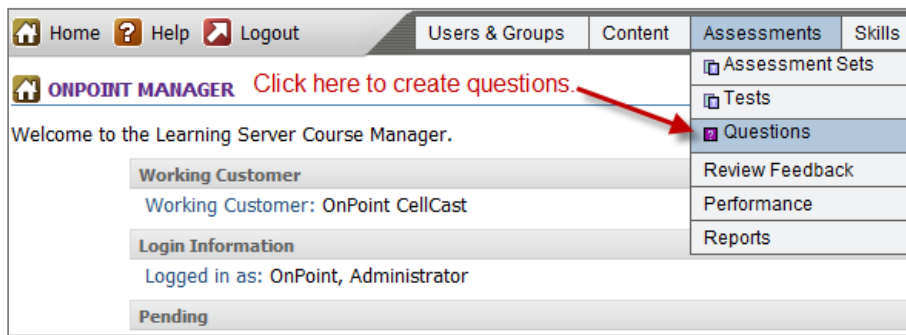
Figure 35 – Question drop-down

Figure 36 – Test Question Creation

a. **Question Name** – Enter the question name. We recommend using some form of numeric or alphabetical naming schema to help you easily organize and later recognize which Questions you'll later assign to your CellCast. For instance, you might name a series of related questions for a CellCast Session to support the rollout of your company's new "Super Widget-1000 Product Line" by applying a "SW1K" or "SW1000" prefix to each question in your assessment series (e.g. SW1K-01, SW1K-02).

b. **Description** – Enter a brief description of the questions here. This information is for your information only, and does not appear anywhere to Users/Learners.

c. **Question Text –** Enter the question text in this field. Remember, whatever text appears in this field will be converted to synthesized speech when your question is read to the CellCast User completing your test (unless you are providing audio clips instead) so make sure the question is concise, makes sense, and has no errors – the synthetic voice is very unforgiving to typed errors.

d. **Answer Type –** Select the answer type that corresponds to this question; select from Multiple Choice/Single Answer, Essay (Voice Response), Likert, Numeric or True/False.

> **NOTE:** Once you've defined and saved your Answer Type for a Question, you cannot return to this screen and change it to another Answer Type – if you make a mistake or change your mind, you'll need to recreate your Question anew.

e. **Graded –** Select whether the question will be graded.

f. **Maximum Points –** Select the maximum points for the question (default is 1).

g. **Remediation Correct –** Not available for mobile devices.

h. **Remediation Incorrect –** Not available for mobile devices.

i. **Reference Page –** Not available for mobile devices.

j. **Category -** Select an appropriate Category from the drop-down list to aide in future organization and management.

k. **Comment Question –** Not available for mobile devices.

To finish up, Click the Save button and the basic structure for your new **Question** will be saved to the shared repository.

2. You can now define corresponding Answers for the question. This process varies depending upon the Answer Type you selected as described below.

> **NOTE**: *We recommend making all your defined **Answers** as short as possible and ensure they are spelled correctly if they are to be converted from text to speech*.

a. ***Choice/Single Answer*** (Graded or Non-graded*).* This is a common CellCast Question type. You can define as many possible answers as you'd like, though keep in mind that the User may forget the list of possible answers if you give them too many choices to listen to and choose from (our recommendation is no more than 4 choices). CellCast Users enter their response by pressing the number key on their phone that corresponds to the selections presented.

To add your answers, click the **Add** link and enter the Answer text. Choose whether this is the "correct answer" (you must mark one of the question answers you create as correct) and click the Save button. Repeat this for all the answer choices.

ASSESSMENTS: QUESTION

Question ID: 458
Question Name: **Sample Choice Question**
Description:
Question Text: What type of mobile device has a trackball?
Answer Type: choice/single answer
Graded: Y
Maximum Points: 1
Remediation Correct:
Remediation Wrong:
Reference Page:
Category: General
Comment Question:
Status: Active

Click here to add your answers.

Edit   Refresh   ◀ List   Preview   Copy As   tip

Answers   **Add   Sequence**
A. BlackBerry (correct)
B. Google Android   Correct answer is shown in green.
C. Palm Pre
D. iPhone

Assets   **Assign   Remove**

Figure 36 – Sample Question and Answers

b. ***Essay/Comment*** (Non-graded). Use this Question type to collect live, spoken word comments for voice-based content and short answer typed responses from message-based content from your CellCast Users. Since Essay/Comment questions are non-graded, you will not need to define any correct answers for them. For voice-based content, CellCast Users provide their responses by speaking into their phones and then pressing the "**#**" key to save and digitize their spoken word comments. For message-based content, CellCast Users simply key in their responses in short message formats (less than 140 characters/message).

c. ***Likert*** (Non-graded). Likert Questions are similar to Multiple Choice/Single Answer Questions outlined above but when defined will automatically include a standardized set of 5 Answers to gauge the respondent's agreement with or rating of the statement/question raised, ranging from "Strongly Disagree" to "Strongly Agree." You are free to edit the standard responses and customize them to fit your specific requirements, including changing the number of answers in the scale as

well. CellCast Users enter their response by clicking the number key that corresponds to their listed selection.

d. **Numeric** (Graded or Non-graded). Use this Question Type when you looking to have the user specify an exact numerical response to a question (e.g., "How many states are there in the U.S.?" -- an example of a Numeric Question Type that could be graded) or to collect a numeric value for a survey question (e.g., "How many patients did your clinic see this week?" – an example of a Numeric Question Type that is not going to be graded). CellCast Users enter their responses to numeric questions by clicking the appropriate number keys on their phones, then submitting their response using the "**#**" key. If the question will be graded, add your answer by clicking the **Add** link and entering the correct numeric response. Choose Yes for "correct answer" and click the Save button.

e. **True/False** (Graded or Non-graded). For all defined True/False Questions, the system automatically generates the "True" and "False" answer choices and sets the default to "True"; you can reset this by clicking either of the two choices and changing the "Correct Answer" value. CellCast Users enter their responses to True/False questions by clicking either "1" for True or "2" for False on their phones.

OPTIONAL STEP FOR VOICE-BASED CELLCASTS:

For optimal CellCast assessment results with voice-based learning **Nuggets**, we recommend you record and upload separate audio clips (as **Assets**) for each defined Question you create, thus eliminating the need for the system to convert the Question text and Answer options to synthesized speech. While it takes a bit more effort to record the spoken word audio clips for the test questions as well as for the main content, the resulting CellCast user experience is greatly improved.

> **TIP:** Consider the type of question you are asking prior to recording it, and change your script just slightly where necessary to help the user. For example:
>
> Your test question script:
> *"How many states are there in the United States?"*
>
> Our recommended narration:
> *"How many states are there in the United States? Using your phone's keypad, enter the number of states, then press the pound or hash key when finished."*

To assign a "spoken word question" audio Asset to any existing Question, click the Assign link to the right of the Assets caption for your Question and select the Asset to assign. To remove an improperly assigned spoken word question Asset, click the Remove link.

3. Once you've defined all the test and/or survey Questions you want to include in your CellCast Session, you need to create a Test to assign them to. To create a Test, go to the Assessments top level menu selection and select Tests from the drop-down list.
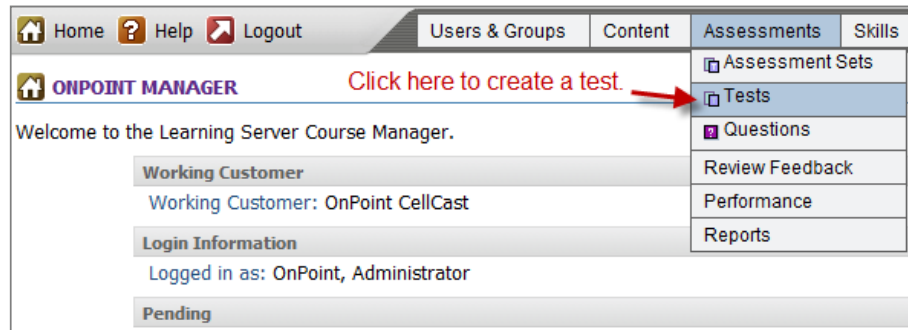
Figure 37 – Test drop-down

Click the Add Test button and begin completing the required fields that define your new CellCast Test/Survey as follows:

Figure 38 – Test Creation

a. **Test Name –** Enter test name here. We recommend using a descriptive name and you should consider using the same sort of prefix you defined for your Questions.

b. **Test Message –** Enter any special instructions you wish to present to the CellCast User (this text would display only if a User decided to take the Nugget and its Test in an online format via the CellCast Portal

c. **Category -** Select a Category from the drop-down menu.

d. **Assessment Type -** Select the appropriate Assessment Type (usually choosing "Test" or "Feedback/Survey").

e. **Passing Score -** Update the Passing Score value if the default value is not appropriate.

The defaulted values for the remaining Test-level fields are generally not used for a CellCast-only site, so you can ignore them if you like. Click the Save button and the basic structure for your new Test will be saved to the shared repository; you can now start assigning Questions to your Test.

4. Click the Assignments sub-menu/tab for the Test you're defining; move down to the Test Set #1 section at the bottom of the screen and click the Assign link to display and select from a list of available/unassigned Questions on the right. Any previously assigned Questions for this Test will be displayed on the left.

> **NOTE:** Click the Filter button if you need to narrow the range of displayed Questions.

Once you've assigned your Question selections, click the Finished button to complete your Test assignments.
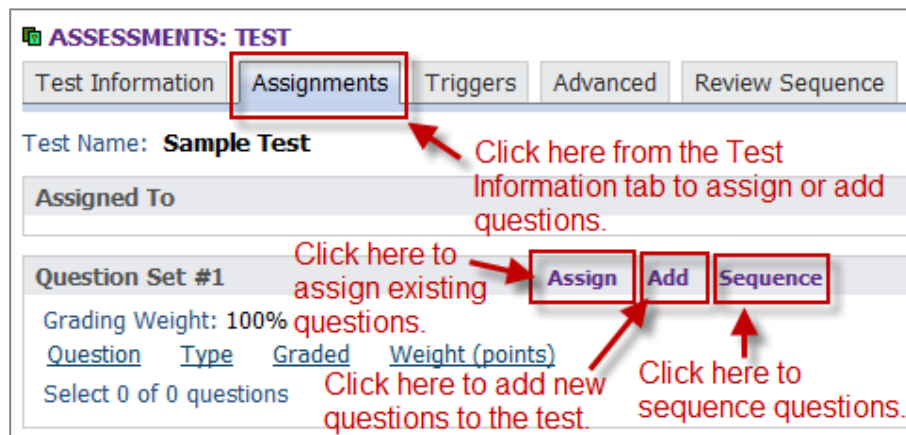
Figure 39 – Assigning Questions to a Test

Use the Sequence link to reorder the assigned questions if desired. Under the Test Information subtab, click the Preview button at the lower right to view your test.

Section C: "CellCast Advanced" Tasks

8. Text-based CellCast Content (Level 4)

Text-based content is the "***lowest common denominator***" format mlearning content delivery via a data-enabled mobile device and stands "a few rungs up the content ladder" compared to the message-based content outlined in previous sections of this document.   As mentioned, access to any text-based CellCast content requires the mobile learner's device to have an active "data plan" on their smartphone device and most content of this variety is presented to the learner via the native mobile web browser found on that device. Apart from these access and presentation differences, the other major distinction between simple message-based content and more advanced text-based content covered in this section is derived from the ability of the content author to better structure and format the content using standard web development tools and methods like the use of standard HTML codes and functions, or through embedding images or other supported media elements into the content to enhance the learning experience.   In fact, we can generalize and suggest that today's text-based mobile content is analogous to standard desktop web-based content circa 10 years ago - akin to the experience gained by reading an illustrated text book or magazine article where good story and imagery are needed to create a compelling and memorable experience for the reader. And like those other static materials, basic text-based mobile content is fairly easy to design and produce as compared to the efforts needed to plan, produce and distribute more advanced rich media content.

Accordingly, the tools need to define and develop text-based content are also fairly easy to learn and use. Text-based mobile content generally consists of one or more connected "pages" and a resulting quiz, test or survey all tied together with simple linear navigation features (e.g., forward and back buttons) that step the learner through the material in page designated order. Each page of text typically contains enough content to convey a single point or learning object and may be formatted to include a simple image or graphic, a bulleted list or relevant hyperlinks.

Tools & Methods for Building Mobile-friendly Text Content

There are several ways to define and generate text-based mobile content; more appropriately, what you need to plan and build is formatted and mobile-friendly HTML content that's optimized for smartphone playback. For most mlearning content authors and CellCast Administrators, the two standard methods to create text-based content are (1) using a popular HTML authoring tool or suite, or (2) using the embedded HTML editor found within OnPoint's Course Manager application.

Wizard-based Nugget Creation Option (Evaluators & New Administrators)

We recommend new or inexperienced CellCast Administrators use the *CellCast Assessment Creation Wizard* to generate new CellCast assessments they wish to assign to their **Courses** and **Nuggets**. While this approach utilizes a limited number of assessment-specific fields, it greatly simplifies the creation process and allows new CellCast system evaluators and partners to create fully functional tests and surveys without having to learn the many nuances of the CellCast platform.

9. Mobile Web Modules (Level 5)

Wizard-based Course Creation (for Evaluators & New Administrators)

We recommend new or inexperienced CellCast Administrators use the *CellCast Course Wizard or Nugget Creation Wizard* to help them define and deploy new CellCast Courses (or Nuggets) that contain mobile web modules.

To use the *CellCast Course Creation Wizard*, log into OnPoint's Course Manager application ("OPCM") as a Site Administrator or Content Administrator using the provided web address (see your Portal Quick Start Guide for more details and addresses). If you have Root Administrator access to a dedicated server or an enterprise license, you'll also need to select the proper "Working Customer" / "Slice" where you want to define and deploy your new CellCasts.

1. Select the **Content** button from the top level menu, and then select **Wizards** from the drop down list; a list of available CellCast Wizards will display. In the Courses section, click the Course Wizard button to launch the creation process for the mobile **Course** you wish to build.
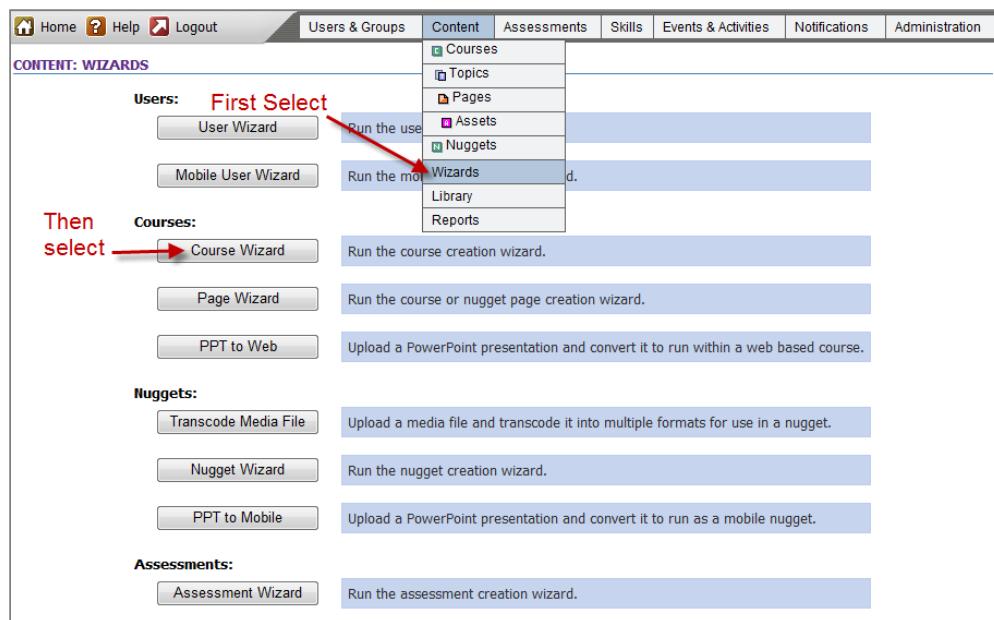
Figure 40 — Starting the Course Wizard

2. Provide responses for each of the displayed fields displayed in the ***Course Wizard: Step 1*** (of three) screen as follows:

Figure 41 — Course Wizard: Step 1

a. **Course Name** – Provide a name for the course you are creating. Shorter names are ideal and avoid punctuation or special characters. This is a required field.

b. **Course Description** – Provide a short written summary each mobile learner will see before beginning their mobile course. It is generally a good idea to tell your Users/Learners the basic learning objective of the content they are about to view. You may also want to define if an assessment or survey follows the course, how many questions comprise that assessment, and how to best navigate through these questions. It is also a good idea to inform Users/Learners that they must answer all questions in an assessment before submitting it for grading/review.

c. Select a **Category** – To help organize your course for later review, select an existing **Category** from those listed in the dropdown menu.

d. Estimated Duration – Enter the estimated duration for the course. This is a required field.

After you've provided values for each field, click the Proceed to Step #2 button in the bottom right corner to continue to Step #2.

Figure 42 — Course Wizard Step 2 before Topic Creation

3. On the ***Course Wizard: Step 2*** screen, click the Add Topic link and fill in the information on the pop-up page as follows:

a. **Topic Name** – Enter the name for this topic. This information will display in the Course Outline for the course and in the Table of Contents on the mobile device.

b. **Description** – Enter the optional description text. This text shows up for the Administrator in OPCM, but does not show up for Users/Learners.

c. **Category** – To help organize your assessment for later review, select an existing Category from those listed in the dropdown menu.

d. Save – Click the Save button to close the window.
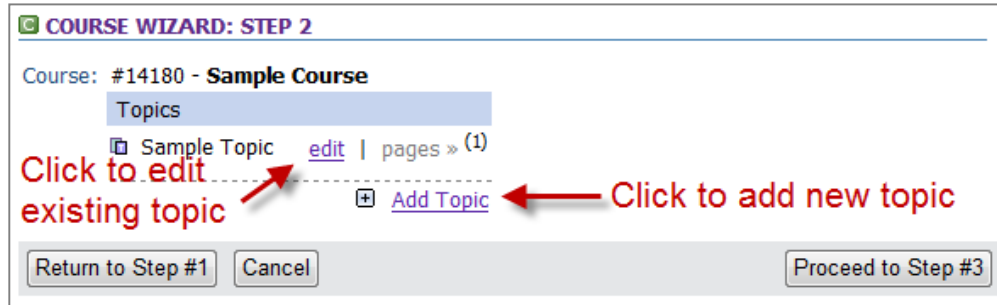
Figure 43 — Course Wizard Step 2 After One Topic Created

NOTE: One topic is required to create a course, but you may choose to add additional topics for organizing your content by clicking the Add Topic link again and following the steps above for each topic you wish to create. You may also choose to edit the any of the fields you've already entered for a topic by selecting the edit link that appears next to the Topic name after you've created the topic.
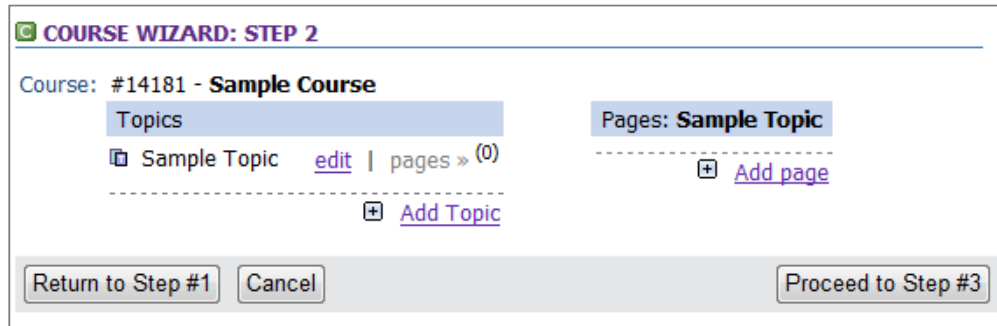
Figure 44 — Course Wizard Step 2 before Page Creation

4. After you have created at least one topic, you will see an Add page link to the right of the Topic(s) you have created. Click the Add page link and fill in the information on the pop-up page as follows in the steps below. Please note that this step allows you to create a page and an asset at the same time, saving one step in the normal course creation process:
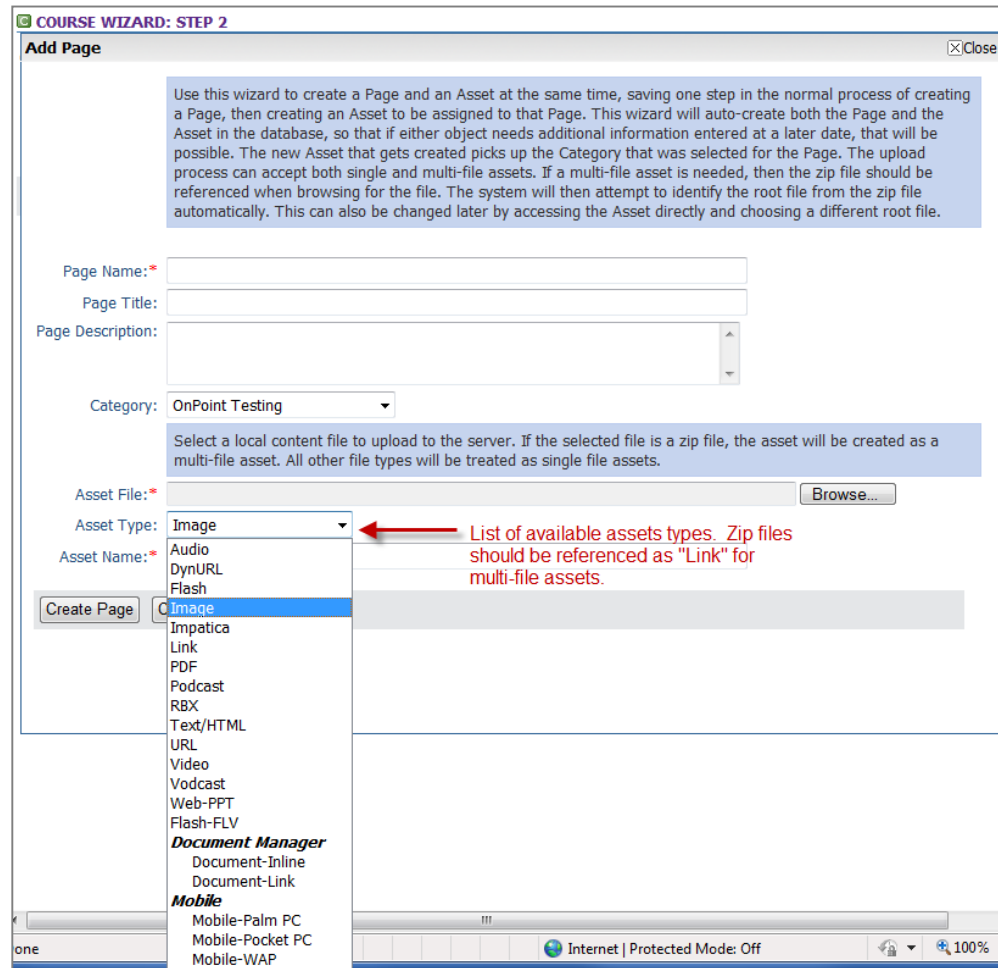
Figure 45 — Course Wizard Step 2: Page Creation

a. **Page Name** – Enter the name for this topic. This information will display in the Course Outline for the course and in the Table of Contents on the mobile device.

b. **Page Title** – Enter the optional page title. It will show up at the top of the page when the Users/Learners view the page.

c. **Page Description** – Enter the optional description text. This text shows up for the Administrator in OPCM, but does not show up for Users/Learners.

d. **Category** – To help organize your assessment for later review, select an existing Category from those listed in the dropdown menu.

e. **Asset File -** Select a local content file to upload to the server. If the selected file is a zip file, use the Link asset selection to create a multi-file asset. All other file types will be treated as single file assets.

    NOTE: The new asset that gets created picks up the category that was selected for the page. The upload process can accept both single and multi-file assets. If a multi-file asset is needed, then the zip file should be referenced when browsing for the file. The system will then attempt to identify the root file from the zip file

automatically. This can also be changed later by accessing the asset directly and choosing a different root file.

f.   **Asset Types** – Select the type of asset you are uploading from the drop-down list that include the following (types listed in **blue** work with CellCast while others currently do not):

- **Audio –** WAV, MP3, GSM
- DynURL
- **Flash (SWF) –** supported on only select mobile devices
- **Image –** JPG, GIF, PNG, etc.
- **Impatica –** Converted PowerPoint presentations
- Link – any multi-file asset that is in a zip file
- **PDF –** not recommended for mobile since it requires device to have a PDF player
- **Podcast –** MP3, WMA, WAV

- **Text/HTML** – HTML page
- URL – website link Video – MP4, M4V, WMV, 3GP, SWF
- **Video/Vodcast** – format varies by device (MP4, M4V, 3GP, WMV)
- **Web-PPT –** Converted PPT files
- **Flash (FLV)** – CellCast Web Manager only
- Document (Inline) – embeds content housed in OnPoint's Document Management system for online only.
- Document (Link) – creates a link to content housed in OnPoint's Document Management system for online only

g.   **Asset Name** – Fill in the name of the asset here.

h.   **Create page**– Click the Create Page button to create your page, upload your asset and close the window.

NOTE: One page with at least one asset is required for a topic, but you may choose to add additional pages for organizing your content by clicking the Add Page link again and following the steps above for each page and asset you wish to create.
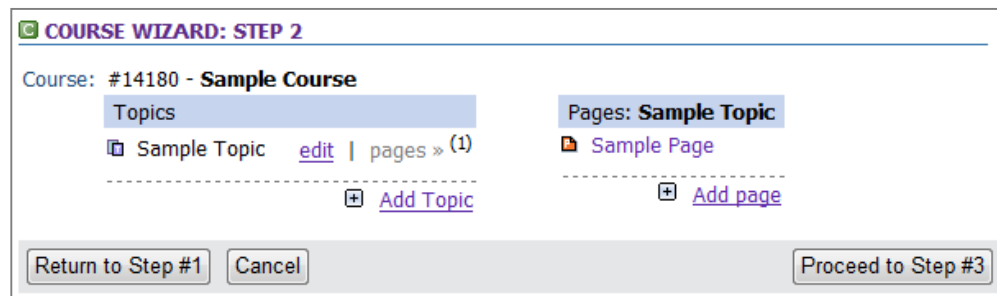
Figure 46 — Course Creation Wizard Step 2 after Page creation

5.   Click the Proceed to Step #3 button to add an assessment to the course. You can use the Filter field to narrow your choices or click the Category dropdown to see only those assessments within a particular category. Click the test, quiz or feedback form you would like to assign to the course. If you do not wish to assign a test to the course at this time, you can always assign one at a later date. When you are finished, click the Finished button to return to the main Wizards page.

Figure 47 — Course Creation Wizard Step 3: Adding an Assessment

6. To publish your course, make assignments or edits, and/or add notifications to your course go to the Content tab and select Courses from the drop-down menu. Select your newly created course from the table or use Filters to narrow your search. Additional help with these tasks is available online by selecting the Help button on the left hand side of the screen in the gray bar.

10. PowerPoint-based Content (Level 5)

The **CellCast Solution** platform includes the ability for an Administrator to upload and convert an existing Microsoft *PowerPoint* presentation, previously built and saved as a standard "PPT" file, into a new lightweight and flexible CellCast format that is both web and mobile friendly.

NOTE: This functionality must be preconfigured and enabled on your CellCast Server before it can be accessed and launched.] Most animations and slide transitions included in the source PowerPoint file are retained in the converted file format and will playback on smartphones or over the web. Also, support for embedded WAV or MP3 audio clips added to slides using PowerPoint's native functionality is also supported on select smartphones.

It is also important to note that not all *PowerPoint*-generated content should be considered mobile friendly and care should be taken in selecting and preparing existing slide presentations for mobile delivery. All slide layouts should use large, easy to read fonts and limits should be placed on the total number of words included on each slide or within bullets. While complex slide builds and graphics are supported, care should be taken in how these slides are designed to ensure they work and are readable following the conversion process. Please refer to OnPoint's *Mobile Content Style Guide* for detailed instructions and best practices to follow when designing and preparing slides for mobile content delivery.

Wizard-based Content Creation for PowerPoint (Evaluators & New Administrators)

We recommend new or inexperienced CellCast Administrators use the *CellCast PPT to Mobile Wizard* to help them create and deploy new CellCast Nuggets containing converted *PowerPoint* content. To use the *CellCast PPT to Mobile Wizard*, log into OnPoint's *Course Manager* application ("OPCM") as a Site Administrator or Content Administrator using the provided web credentials. If you are a Root Administrator, make sure you select the proper "Working Customer"/"Slice" where you want to define and deploy your new *PowerPoint*-based CellCast content.

1. Select the **Content** button from the top level menu, and then select **Wizards** from the drop down list; a list of available CellCast Wizards will display. In the Nugget/Mobile section, click the PPT to Mobile button to launch the conversion and creation process for the existing and compatible *PowerPoint* presentation you wish to deploy and a screen with detailed instructions and fields requiring input will appear (see Figure 48 below).

Figure 48 – PPT to Mobile Wizard Entry Screen

2. Provide responses (or a file) for each of the displayed fields shown above in Figure 48 as follows:

   a. **PPT File** – Click the Browse button to search your local HDD or server for a PowerPoint file you want to upload and convert to mobile format.

   b. **Nugget Name** – Provide a name for the Nugget you wish to create. Make sure the Nugget name is descriptive and avoid using special characters or symbols. This is a required field.

   c. Provide a **Catalog Description** – Enter a short description for the Nugget you wish to create; this text is displayed whenever a User/Learner accesses the Nugget on the web or their mobile device and is also full text indexed and used whenever a search for content is requested.

   d. Enter **Estimated Duration** - Provide an estimate for the total amount of time (in hours or minutes) it should take the average User/Learner to review the content assignment and complete any associated assessment.

   e. Select a **Category** – To help organize your Nugget for later access or review, select an existing **Category** from those listed in the dropdown menu.

   f. Provide a **Page Name** – Provide a short name for the internal CellCast **Page** that will be associated with your *PowerPoint* content.

   g. Provide an **Asset Name** – Provide a short name for the internal CellCast **Asset** will be associated with the converted *PowerPoint* content you are uploading.

After you've provided values for each field, click the Create Nugget button in the bottom right corner to begin the conversion process.

3. Finally, you are now free to assign Users/Learners or a **Test** to your new learning **Nugget** following the appropriate instructions for that content type.

Desktop-Based Content Creation for PowerPoint (Advanced)

For Administrators who are interested in creating mobile-friendly PowerPoint files from their desktop, OnPoint recommends using *Impatica for PowerPoint* to convert existing PowerPoint files to a format that can be imported into the CellCast system as an asset.

If you plan to embed audio in your presentation, you will currently need to use this method for conversion, though we anticipate a web-based option in the near future. OnPoint recommends that customers use the Slide Transition feature in PowerPoint and attach a pre-prepared audio clip to each slide. This results in the best overall quality for the final product.

1. **Create audio track for PowerPoint presentation.** To prepare audio tracks to be included with your PowerPoint presentation, refer to the *Audio Preparation Guidelines* document or call OnPoint support.

2. **Insert audio tracks in PowerPoint presentation.** Open the PowerPoint file and add the sound file to the slide transition for each slide.
   a. For **PowerPoint 2003 and earlier**: From the Slide Show menu, choose Slide Transition. In the Slide Transition panel, ribbon or dialog box, click on the drop down box under the Sounds heading. Select Other Sound. The Add Sound (or Choose a Sound) dialog box will appear through which you can select the external sound file to be added to the slide transition for that slide.

   b. For **PowerPoint 2007**: From the Animations menu, choose Slide Transition. In the Slide Transition panel, ribbon or dialog box, click on the drop down box under the Transition Sounds heading. Select Other Sound. The Add Sound (or Choose a Sound) dialog box will appear through which you can select the external sound file to be added to the slide transition for that slide.

   c. After your file is inserted, you may wish to test your animation timings and manually set them to match narration pacing.

3. **Save the PowerPoint file as a .PPT file** and close the file.

4. **Impaticize the PowerPoint presentation.** Open Impatica. Click the "Add" button to select the PowerPoint file you wish to convert.

   a. Settings for the file should be:

      1. On the **Slide Show tab**: Classic Impatica file format (.imp). Do not select "Include Playback Controls."

      2. On the **Media tab**: set JPG Quality to 100% and leave the "Always Recompress" checkbox checked. Set the Sound Format for "WAV-PCM (10 x Compact Size)." Leave all other settings at their default setting.

      3. On the **Extra Output Files tab**, unselect all checkboxes.

b. Click the "Impaticize" button at the bottom right of the box to create the .IMP file.

c. Click the "Preview" button to confirm that your PowerPoint converted correctly. If you are happy with the results, click the "Done" button.

5. **Upload the .IMP file output file into the CellCast system**.

a. Log into OPCM as an Administrator. If logging in as a Root Admin, select the slice you will be working in.

b. Go to the Content tab, select Nugget from the drop-down list, then click the "Nugget Wizard" button.

c. Fill in the required screens (see Figure 49 below) and click the "Proceed to Step #2" button.
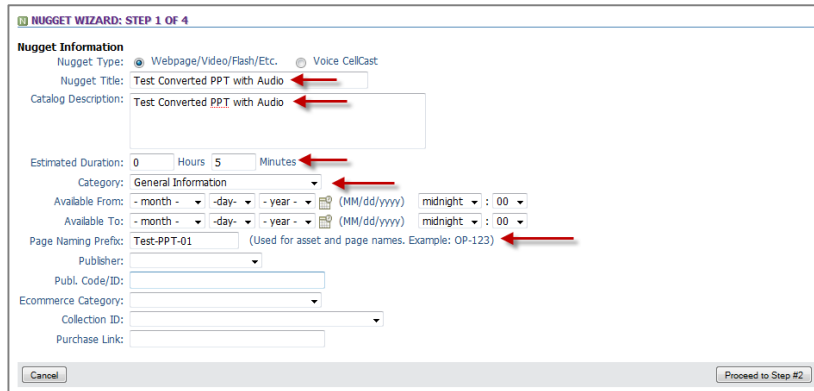
Figure 49 – Screen 1 of Nugget Creation Wizard

d. Select Audio Format PPT-2-Mobile under the Other Media Files/Content section (see Figure 50 below) and click the "Proceed to Step #3" button.
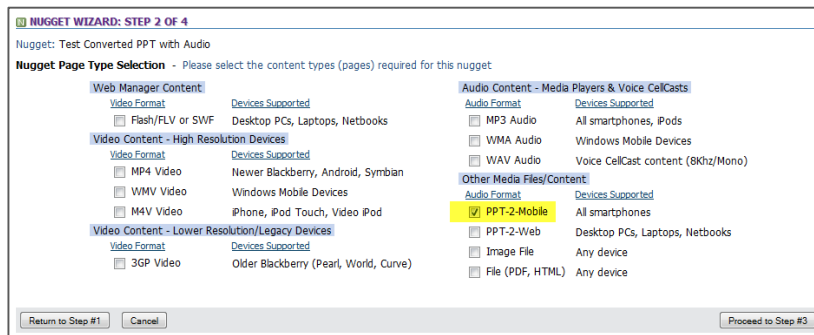
Figure 50 – Step 2 of the Nugget Wizard

e. Browse your computer's hard drive for the file using the "Browse" button, click "OK", the click the "Proceed to Step #4" button (see Figure 51 below).
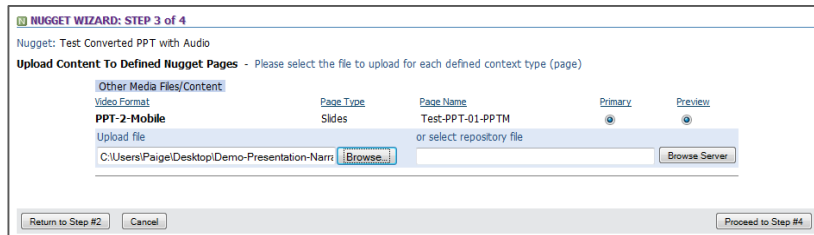
Figure 51 – Step 3 of the Nugget Wizard

f. From the final wizard screen, you have the option to "Create Another Nugget," "View Nugget," or "Exit Nugget Wizard" (see Figure 52 below). To publish your Nugget and make assignments, click the "View Nugget" button.
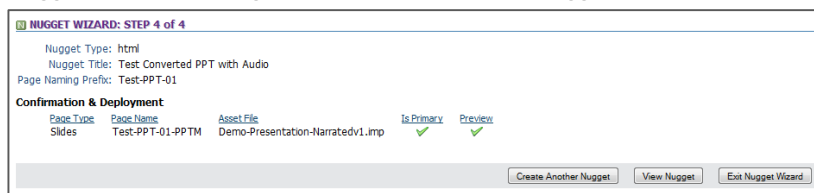
Figure 52 – Step 4 of the Nugget Wizard

g. On the Nugget Information subtab, you will need to click the "Publish" button to make the nugget available. Click the Assignments subtab and select Assign in the Assigned Users section to assign users to the content.

NOTE: As an alternative to assigning users individually, the Nugget may be assigned to a Group of Users under Users and Groups tab. To do this, select Groups from the drop-down menu in the Users and Group tab, select the Group to whom you would like to assign the content from the list, click the "Assignments" subtab and click Assign under the "Assigned Nuggets" section. You can then select the Group(s) to whom you wish to assign the Nugget.

11.   Transcoding Media Files (Level 6)

Truly one of the most compelling and engaging content types deliverable on a compatible smartphone is a high quality video or audio presentation. Knowledge workers of all ages are already conditioned to consume information in visual and auditory formats after years of exposure to television and films, and more recently the wave of streaming video consumed online or downloadable podcasts accessed through on a portable MP3 player. Interestingly, video and audio content playback on a capable mobile device can be just as effective as playback on the same content on a desktop computer or laptop though the viewing (or listening) experience is more generally more personal and intimate. Until now, the challenges involved in deploying rich media content to advanced smartphone devices have been more about compression formats and delivery methods than the technical capabilities of the mobile device. To assist our customers in addressing these challenges, the CellCast Solution platform provides Administrators with access to a sophisticated yet simple to use rich media *Transcoding Engine* that automatically converts compatible media files into mobile-friendly learning content to any organization's exact specifications.

OnPoint's *Transcoding Engine* is a server-based process that ingests and produces media-based source files and converts them into a series of video and audio formats that match your community's supported Mobile Devices. For instance, an MPEG4-based video file produced by the Marketing Group can be uploaded and automatically converted into a series of video files for mobile playback including an MP4 file and a 3GP2 file for playback on newer and older BlackBerry handhelds (respectively) plus an M4V file for playback on Apple iPhone or iPod touch media players plus a WMV file for playback on Windows Mobile smartphone and finally as audio-only versions for playback on MP3 players or broadcast as voice-based CellCast content. All transcoding sessions leverage a set of predefined encoding profiles and compression templates that ensure that every conversion effort meets specific guidelines – *these templates must be predefined by the **CellCast Support Team** and deployed to your **CellCast Server** prior to launching any transcoding effort*.

Transcoding Wizard Operation (Evaluators & Experienced Administrators Alike)

If you've got a compatible video (or audio) file you wish to convert and deploy as a CellCast **Nugget**, the first thing you'll need to do is run the *CellCast Transcoding Wizard* and prepare rich media files for each of the mobile device types supported in your environment. Place a copy of the source media file on your desktop PC or laptop and confirm the file opens and plays back properly in its original format before launching the *Transcoding Wizard*; files that won't work in normal playback will not improve via the transcoding process.

Next, log into OnPoint's Course Manager application ("OPCM") as a Site or Root Administrator using the provided web address; if you are Root Administrator, you'll also need to select the proper "Working Customer" / "Slice" where you want your transcoded media files to be accessible and available.

1. Select the **Content** button from the top level menu, and then select **Wizards** from the drop down list; a list of available CellCast Wizards will display. In the Nugget/Mobile section, click the Transcode Media File button to launch the creation process for the new learner account you wish to build. The screen will update to display detailed instructions to assist you in planning and launching a transcoding session for a specific piece of compatible media-based content (see Figure 53).

NOTE: *If you don't see a "Browse" button on your screen, the transcoding functionality has not been enabled or properly configured on your CellCast Server and you'll need to contact the* **CellCast Support Team** *for assistance.*

Figure 53 – CellCast Transcoding Wizard Display

2. Browse your local HDD or server for a compatible media file (it must be less than 100 MB in size) and click the Update File button to begin the upload and conversion process. Your file will automatically be transferred to a **CellCast Transcoding Server** where it will be placed into a *Transcoding Queue* and processed on a first come/first served basis. The time needed to convert the source media file into all of the defined output files depends on several factors including source file size, connection speed, queue position and the total number of transcoding templates you've predefined for your mobile device community. In general, it can take from 2 minutes to 10 minutes or more to complete each transcoding task you initiate. However, it is possible to add additional source files in series into the *Transcoding Queue* without needing to wait for the conversion process to finish for your first uploaded source file.

3. **Transcoding Completion Verification** - To help you determine when each source file has been fully processed and your transcoded files are ready for use, the CellCast Server will automatically generate and send you an email (or SMS message) detailing the final results of the transcoding session; this serves as an indication that you can now proceed with defining your CellCast Video or Audio Nugget using the CellCast Nugget Wizard (see **Task #12** and **Task #13** that follow).

12. *Audio-based Content (Level 6)*

Another popular format for rich media mobile content is an audio podcast which can contain such things as narrative content, recorded meetings or conference calls, customer testimonials, just-in-time product or sales updates, etc. One of the advantages of an audio-only format is the ability for mobile learners to listen to long form content (e.g., 10 minutes, 30 minutes, even a full hour) as this content format, unlike most of the other mobile options, can be accessed in a "launch & listen" setting while commuting, walking/exercising, waiting in a queue, etc. But unlike regular podcasts listened to via an MP3 player or iPod-like device, CellCast audio podcasts can be tracked and assessments can also be associated with these mobile learning assignments.

 You can approach this in one of two ways: (1) new Administrators can utilize the CellCast *Nugget Wizard* to define and deploy an audio podcast or (2) experienced Administrators can define and finesse their podcasts manually using standard system functions; either approach is fine.

Wizard-based Nugget Creation Option (Evaluators & New Administrators)

We recommend new or inexperienced CellCast Administrators use the *CellCast Nugget Creation Wizard* to generate new audio-based CellCast Nuggets.   This approach greatly simplifies the creation process and allows new CellCast system evaluators and partners to create fully functional podcast-style nuggets without having to learn the many nuances of the CellCast platform.

To use the *Nugget Creation Wizard*, log into OnPoint's Course Manager application ("OPCM") as a Site Administrator or Content Administrator using the provided web address (see your Portal Quick Start Guide for more details and addresses). If you have Root Administrator access to a dedicated server or an enterprise license, you'll also need to select the proper "Working Customer" / "Slice" where you want to define and deploy your new CellCasts.

1. Select the Content button from the top level menu, and then select Wizards from the drop down list; a list of available CellCast Wizards will display. In the Nuggets section, click the Nugget Wizard button to launch the creation process for the new nugget you wish to build.
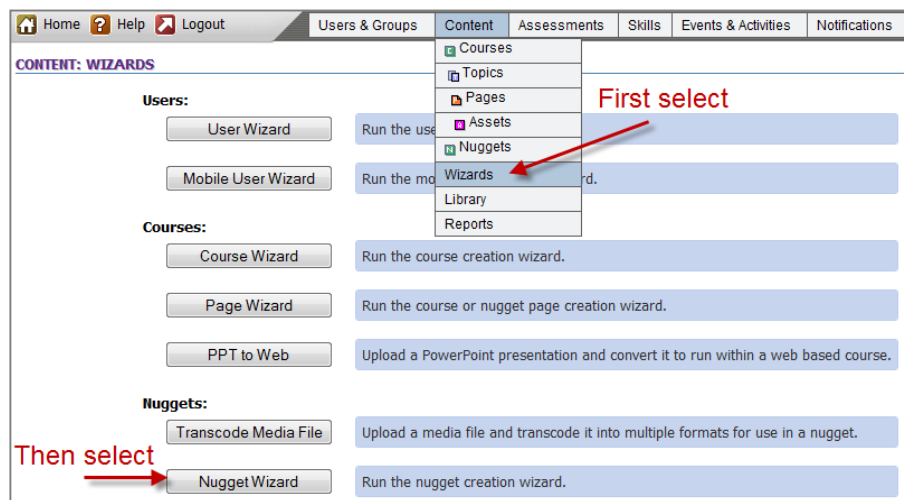
Figure 54 – Nugget Wizard Selection

2. Fill in the required screens (see Figure 55 below) and click the Proceed to Step #2 button.

Figure 55 – Step 1 of Nugget Creation Wizard

3. Select **MP3 Audio** under the **Audio Content – Media Players & Voice CellCasts** section (see Figure 56 below) and click the Proceed to Step #3 button.

    NOTE: *MP3 files play on all smartphones and iPods.*

Figure 56 – Step 2 of the Nugget Creation Wizard

4. Browse your computer's hard drive for the MP3 file using the Browse button, click "OK", the click the Proceed to Step #4 button (see Figure 57 below).

Figure 57 – Step 3 of the Nugget Creation Wizard

5. From the final wizard screen, you have the option to "Create Another Nugget," "View Nugget," or "Exit Nugget Wizard" (see Figure 58 below). To publish your Nugget and make assignments, click the View Nugget button.
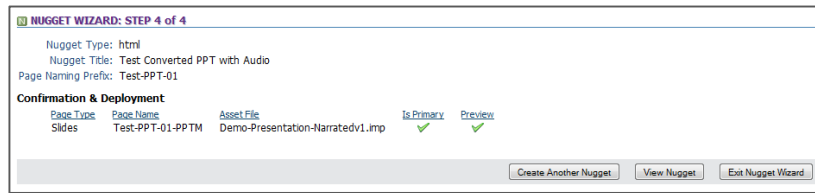
Figure 58 – Step 4 of the Nugget Wizard

b. On the Nugget Information subtab, you will need to click the `Publish` button to make the nugget available. Click the Assignments subtab to assign a test or to assign users to the content.

NOTE: *As an alternative to assigning users individually, the Nugget may be assigned to a Group of Users under Users and Groups tab. To do this, select Groups from the drop-down menu in the Users and Group tab, select the Group to whom you would like to assign the content from the list, click the "Assignments" subtab and click Assign under the "Assigned Nuggets" section. You can then select the Group(s) to whom you wish to assign the Nugget.*

13. *Video-based Content (Level 6)*

The final format for rich media mobile content is a mobile video presentation which can consist of any manner of visual narrative content, recorded presentations, marketing materials, customer testimonials and case studies, just-in-time product or sales updates, etc. Similar to the audio-only content format outlined in the previous section, mobile learners are often okay with viewing longer form content (e.g., 5 minutes to 15 minutes) using this content format, though highly detailed videos are harder to follow whenever a user might be easily distracted. And unlike regular video podcasts or vodcasts accessed via an MP3 player or video iPod-like device, CellCast videos are tracked and assessments can be associated with these mobile learning assignments.

 You can approach this in one of two ways: (1) new Administrators can utilize the CellCast *Nugget Wizard* to define and deploy a video podcast for each type of mobile device you have in your mobile ecosystem or (2) experienced Administrators can define and finesse their video podcasts manually using standard system functions; either approach is fine.

Wizard-based Video Content Creation Option (Evaluators & New Administrators)

We recommend new or inexperienced CellCast Administrators use a combination of the *Transcode Media Wizard* and the *CellCast Nugget Creation Wizard* to generate new video-based CellCast Nuggets.   This approach greatly simplifies the creation process and allows new CellCast system evaluators and partners to create fully functional podcast-style nuggets without having to learn the many nuances of the CellCast platform.

To use the *Transcode Media File Wizard*, log into OnPoint's Course Manager application ("OPCM") as a Site Administrator or Content Administrator using the provided web address (see your Portal Quick Start Guide for more details and addresses). If you have Root Administrator access to a dedicated server or an enterprise license, you'll also need to select the proper "Working Customer" / "Slice" where you want to define and deploy your new CellCasts.

1. Select the **Content** button from the top level menu, and then select **Wizards** from the drop down list; a list of available Wizards will display. In the Nuggets section, click the Transcode Media File button to launch the transcoding process for the video nugget you wish to build.
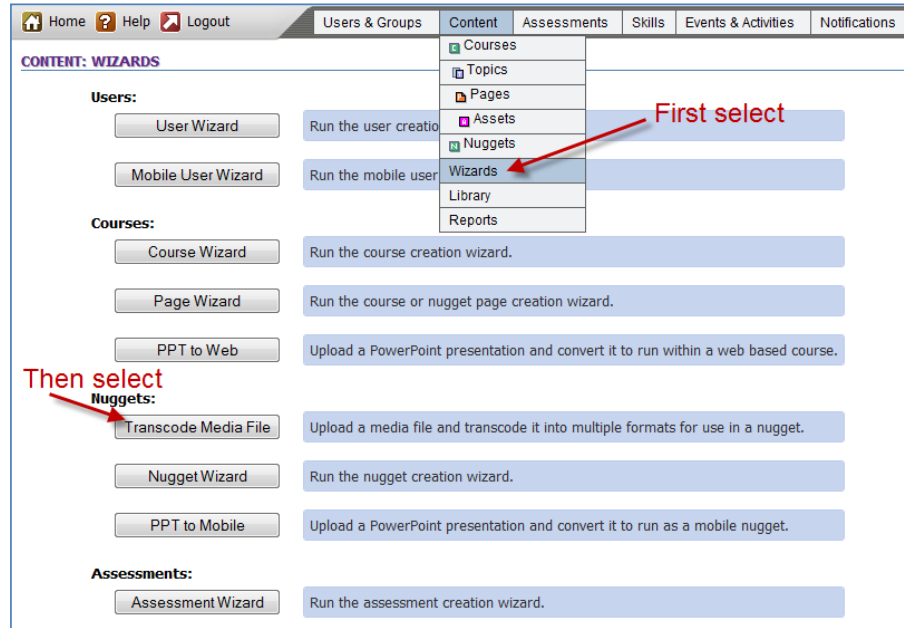
Figure 59 - Transcode Media File Wizard Selection

2. Browse your hard drive or server for your source video clip. Supported input formats are: MP4, MOV, M4V, WMV, 3GP, and AVI. The maximum file size for the wizard is 100 MB. Flash files (SWF or FLV) are not supported. Once you have selected your video, click the Update File button to begin the Transcoding process.
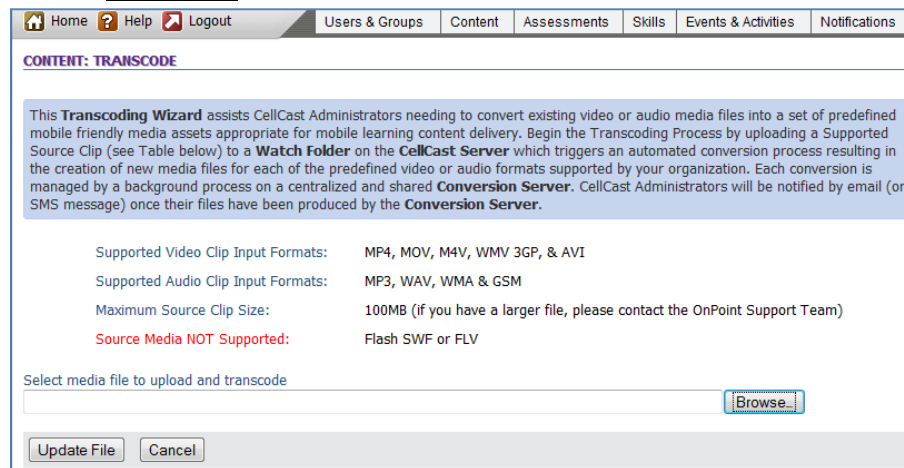
Figure 60 – Transcoding Media Screen

3. There will be a pause after you click the Update File button before you are returned to the main Wizards page, there while the server processes your request and triggers the automated conversion process that will result in the creation of new media files for each of the predefined video or audio formats supported by your organization. Each conversion is managed by a background process on a centralized and shared **Conversion**

Server. CellCast Administrators will be notified by email (or SMS message) once their files have been produced by the **Conversion Server**.

4. Once you receive notification that your files are ready, go back to the main Wizards page and select the Nugget Wizard button to begin creating your nugget.
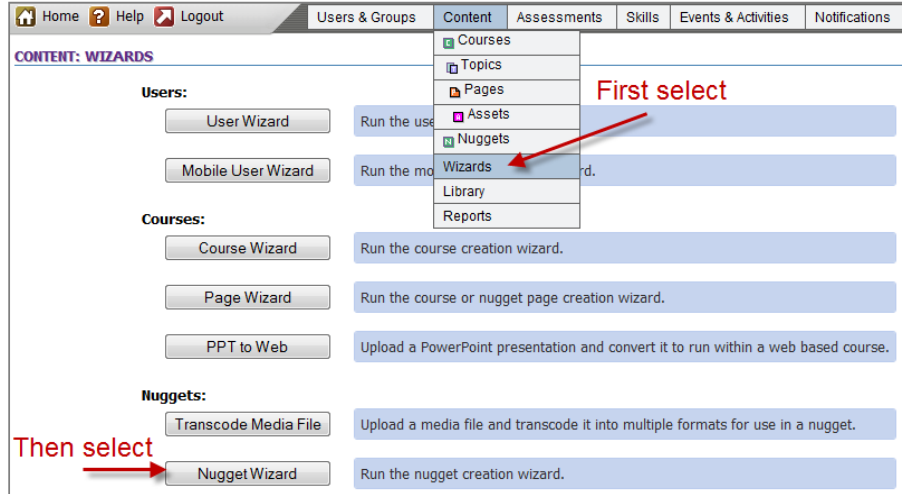
Figure 60 – Video Nugget Creation using the Nugget Wizard

5. Fill in the required fields, including Title, Description, Duration, and Category and then assign it a Page Naming Prefix. You can also choose the dates and times you would like the content to be available on this screen. Click the Proceed to Step #2 button to continue.
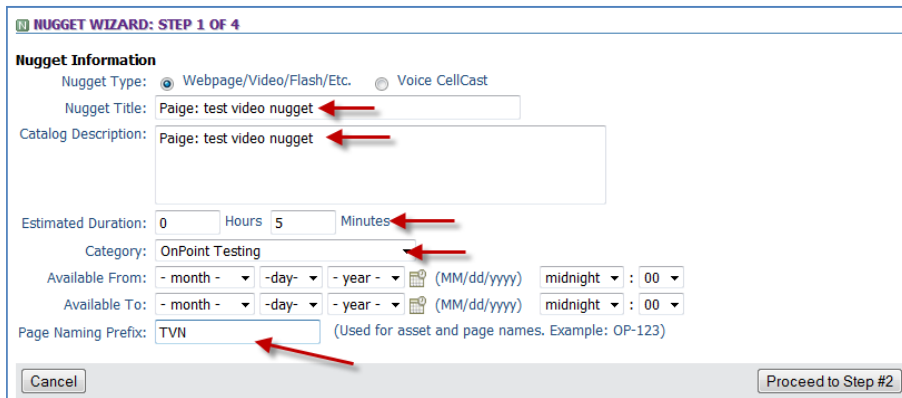
Figure 61 – Video Nugget Creation – Step 1

6. For Step 2, select the various required video types based on the devices you need to support. In the example on the next page, Flash has been selected to support users who wish to take the content online, and MP4, M4V and 3GP have been selected to support the specific mobile device types. Click the Proceed to Step #3 button to continue.

Figure 62 – Video Nugget Creation – Step 2

7. In Step 3, you will have a list of the content types you selected in Step 2 and a field to select the correct file for each. Select the Browse Server button on the right-hand side of the screen to browse for the first file. In the example below, the first file type is Flash/FLV.

Figure 63 – Video Nugget Creation – Step 3a

a. Click the **Transcode** link to filter the results to show only those assets that have been created using the Transcoding Wizard.
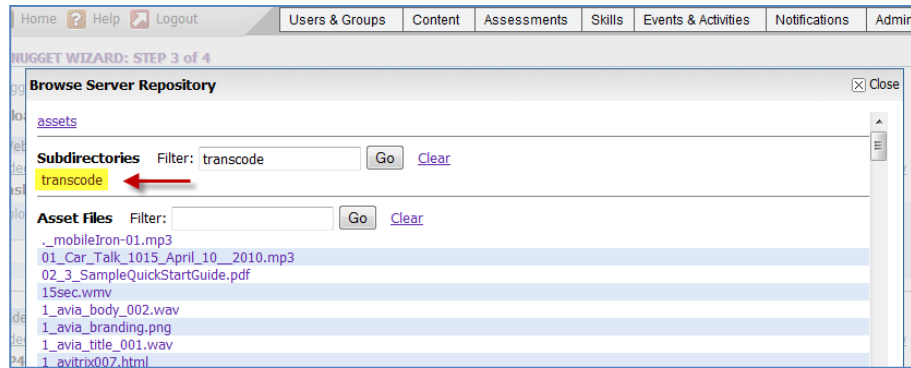
Figure 64 – Video Nugget Creation Step 3b

b. Select the file with the format/extension that matches the one you're choosing in Step 3a (for our example, the FLV file) from the list of files you transcoded.
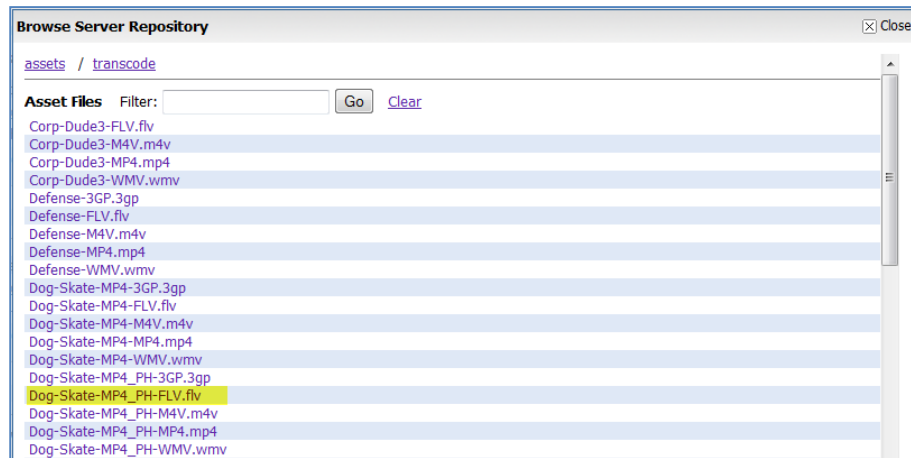
Figure 65 – Video Nugget Creation Step 3c

c. Repeat Steps 3a through 3c for each of the file formats listed then select Proceed to Step #4 to continue.

Figure 66 – Video Nugget Creation Step 3d

8. Step 4 of the Nugget Creation Wizard shows you the various video formats you've transcoded and assigned to the nugget to support the various devices your users may have. You have the option to "Create Another Nugget," "View Nugget," or "Exit Nugget Wizard" (see Figure 67 below). To publish your Nugget and make assignments, click the "View Nugget" button.

Figure 67 – Video Nugget Creation Step 4

9. On the Nugget Information subtab, you will need to click the "Publish" button to make the nugget available. Click the Assignments subtab to assign a test to the nugget or to assign users to the nugget.