

User Notes Feature Set - v2

August 2020



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Summary

The functionality of User Notes has been expanded upon and improved in the OPLS 7.4 release. User notetaking has always been supported in OnPoint's OPCV (Content Viewer) online application, allowing the user to capture notes of a general nature as well as notes associated with a particular piece of content, but the notes were not editable nor were they easily accessible by way of the newer customized portal or mobile app interfaces.

The recent software updates provide a common notetaking experience across both the web (online portal) and mobile (CellCast) apps with a new, intuitive interface with which users may add, review, and edit their general notes as well as their notes specific to individual learning objects. Access to notes is now possible from a custom interface link or menu item, from within a particular content item via the Details modal, and yes, still from the OPCV content player area.

Notetaking is also now available from within actual PDF nuggets, where users may add notes while within their learning content without requiring an exit from the nugget. These user notes can then be reviewed from the main Notes area accessible from the UI, along with other recorded entries. Additional updates to extend this same functionality to other object types beyond .pdf files are being considered for future releases in 2021.

Adding the new notes functionality within custom interfaces does require a quick UI update to the interface so that a link to notes can be added to the home page or left menu navigation panel. Please speak to your OnPoint Engagement Manager to plan this update.

Applications involved

- OPPortal
- OPCV
- Mobile CellCast Apps
- Custom Interfaces

Notes Setup

There are only two setup steps required to utilize the new Notes functionality:

- 1) Set the Show Notes setting in OPCM-Administration-Configuration to Yes
- 2) Update custom interfaces to provide access to the Notes interface where appropriate for each customer interface

To access the notes function within PDF nuggets on mobile, an updated mobile CellCast app build is required.

Once these updates are in place, no further setup or changes are required.

Access and Appearance of Notes

The Notes feature is an option that can be enabled for user interfaces both in web browsers and on mobile CellCast apps. Notes added from any location can be reviewed and edited from any other location in which notes are accessible.

The implementation of user notes can and likely will vary depending on the interface, specific customer needs, and the user's device, but a standard set of options is illustrated below. All Notes page views are responsive and will re-size in accordance with the size and orientation of the user's screen.

My Notes

The My Notes option can be added as a menu option in the left-hand navigation menu (typically accessed via the hamburger icon). From this link, users can open the Notes view to see the full list of all notes they have added both generally and for individual items.

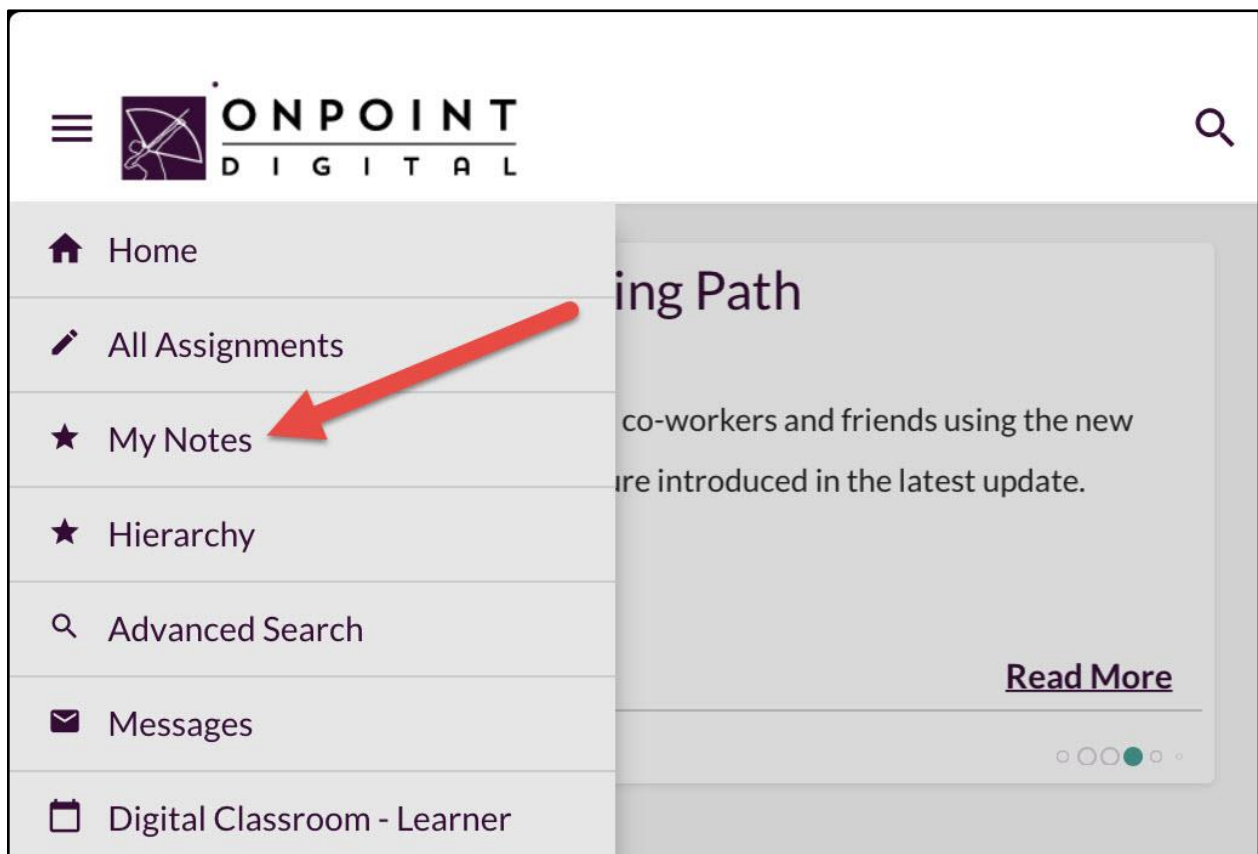


Figure 1: My Notes in left nav menu

Notes List

Accessing Notes from a My Notes link in the UI opens the user to their “All” notes list (the default). Each note in the list includes the Note Title, the topic (either “General” or the name of the specific learning object if the note is associated to a particular content item), and a snippet of the note text.

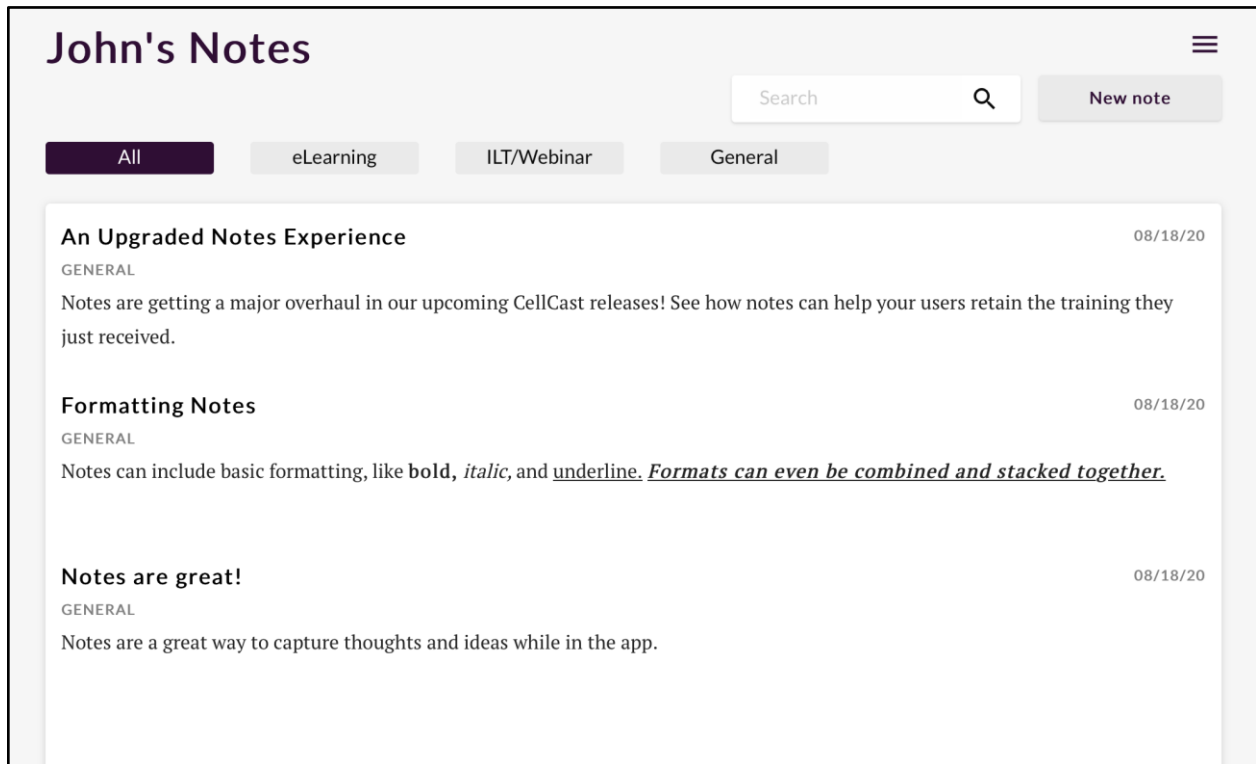


Figure 2: All Notes list for a user

Over time there may be a large number of stored notes, so the Notes area provides several functions to help users navigate the list and locate specific notes:

- The tabs at the top of the list allow for filtering the list by:
 - **All** notes added both for specific objects and in general.
 - Notes pertaining to **eLearning** objects, such as courses, nuggets, assessment sets, and activities.
 - Notes added for specific **ILT/Webinar** events.
 - **General** notes not related to any specific learning object.

[Notes taken at the Skill Profile/Curriculum level are in development.]

- **Search** allows for searching for specific words in note titles or text (including a check of all note body text).
- Finally, the hamburger menu at the top right of the page opens additional options to:

- **Sort [the notes] by** the Date the note was added (the default) or by the Title of the note. The sort affects just the current list.
- **Print [all] notes**, allows users to save an offline copy of the notes or to print a physical copy for their records.

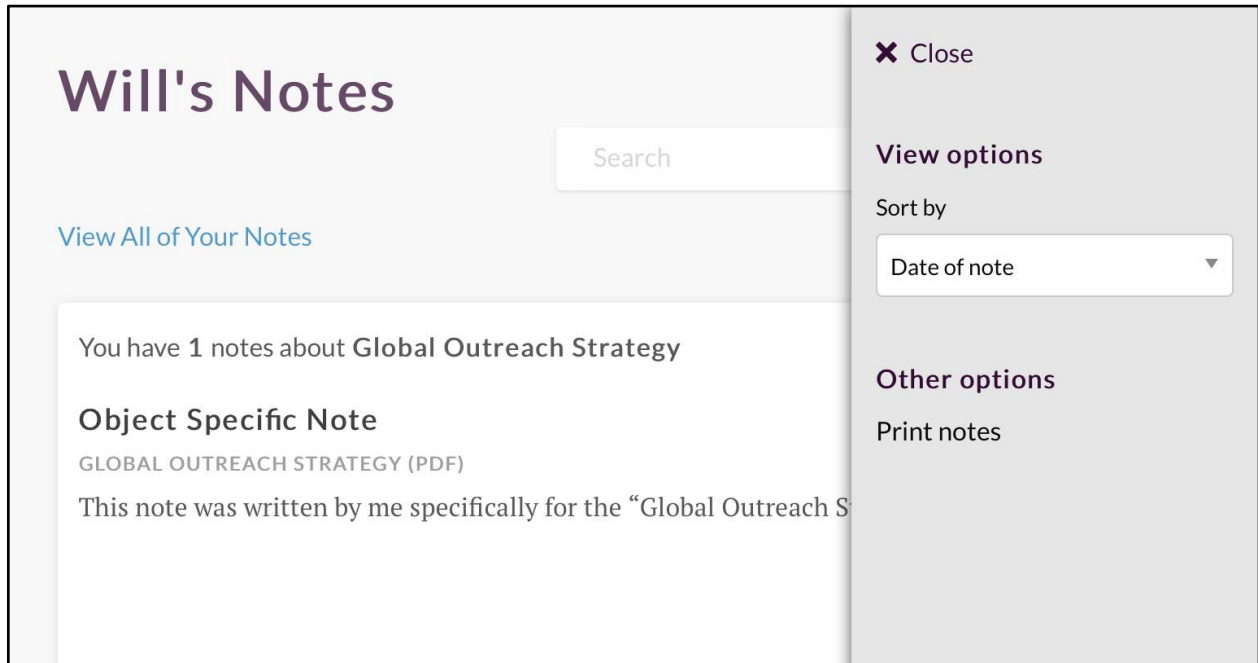


Figure 3: Notes hamburger menu options

Adding a New Note

At the top right of the notes list there is a button to create a **New note**. Selecting this will allow the user to write a new “general” note. The user will enter a title, then add their note text. Basic HTML formatting/styling options include bold, italic, underscore, subscript and superscript.

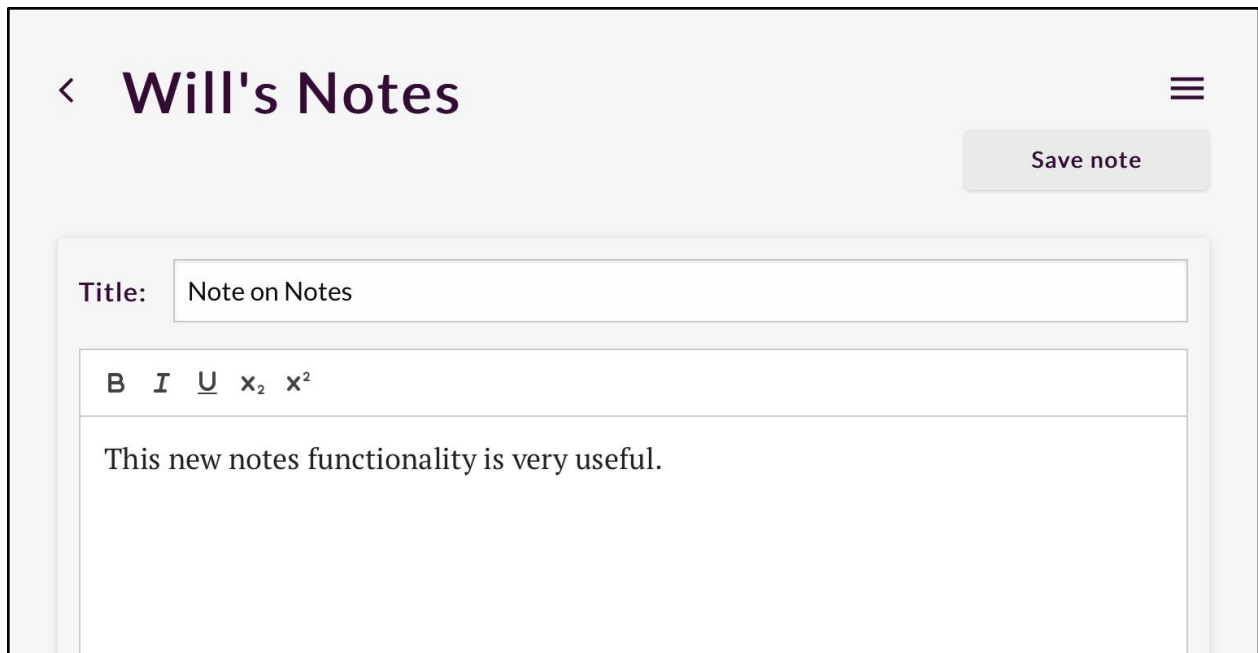


Figure 4: A new note

Selecting **Save note** confirms the note and adds it to the user's list.

Viewing and Editing a Note

Selecting a note from the list opens to a Note View page. If the note is more than one or two lines, the entire note text can be reviewed here beyond the snippet included on the notes list.

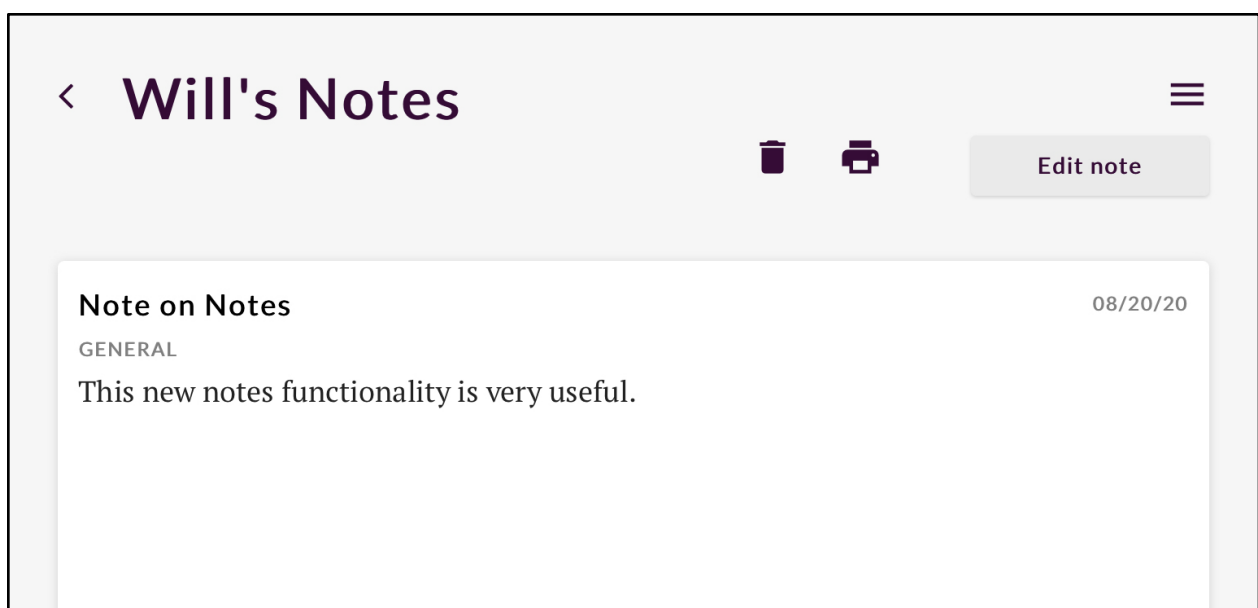


Figure 5: Reviewing an existing note

This view also has several options:

- **Edit note** allows the user to edit the note title and text as needed. The editor is the same one used when creating a new note so all the same options are available. The edit page will display a 'Save Changes' button to confirm an edit.
- The trash can icon allows the user to **Delete** this note. As this action cannot be reversed the user is prompted to confirm before the deletion takes place. The user is then returned to the notes list view.
- The **Print** icon allows the user to save an offline version of this note (print to PDF) or to print a physical copy for their records.

Notes for Learning Objects

If users wish to add notes that are specific to one of their assigned objects, a “Notes” button is available on the [Details](#) modal view for Courses, Nuggets, Assessment Sets, Events, and Activities of newer custom interfaces.

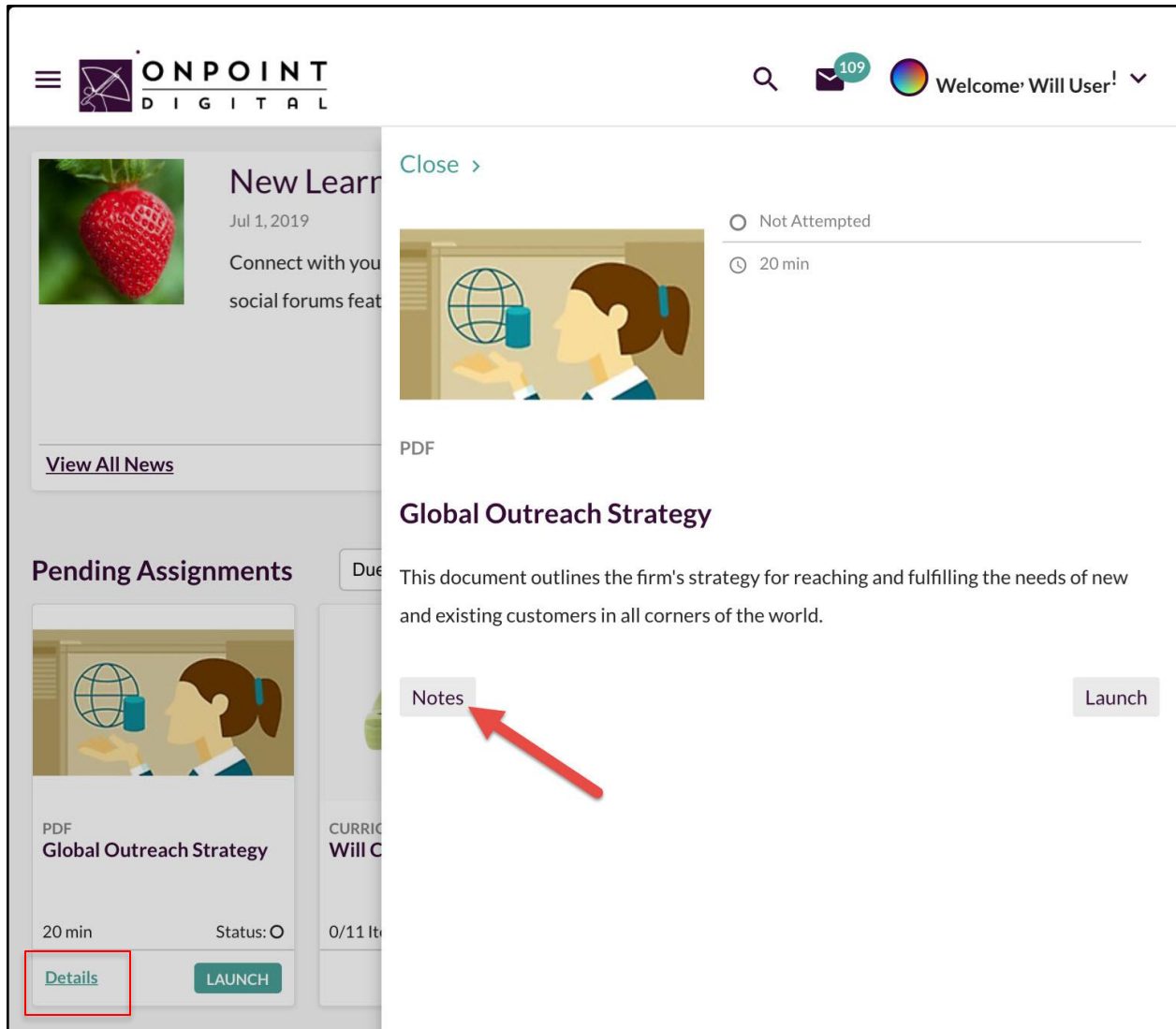


Figure 6: Notes option for a learning object

Selecting this option takes users to a list of their notes specific to this learning object. If the user has not written any notes for this object, the list will be empty. If there *are* notes present, they can be edited or new notes can be added. The user can also get to their full list of notes from this page.

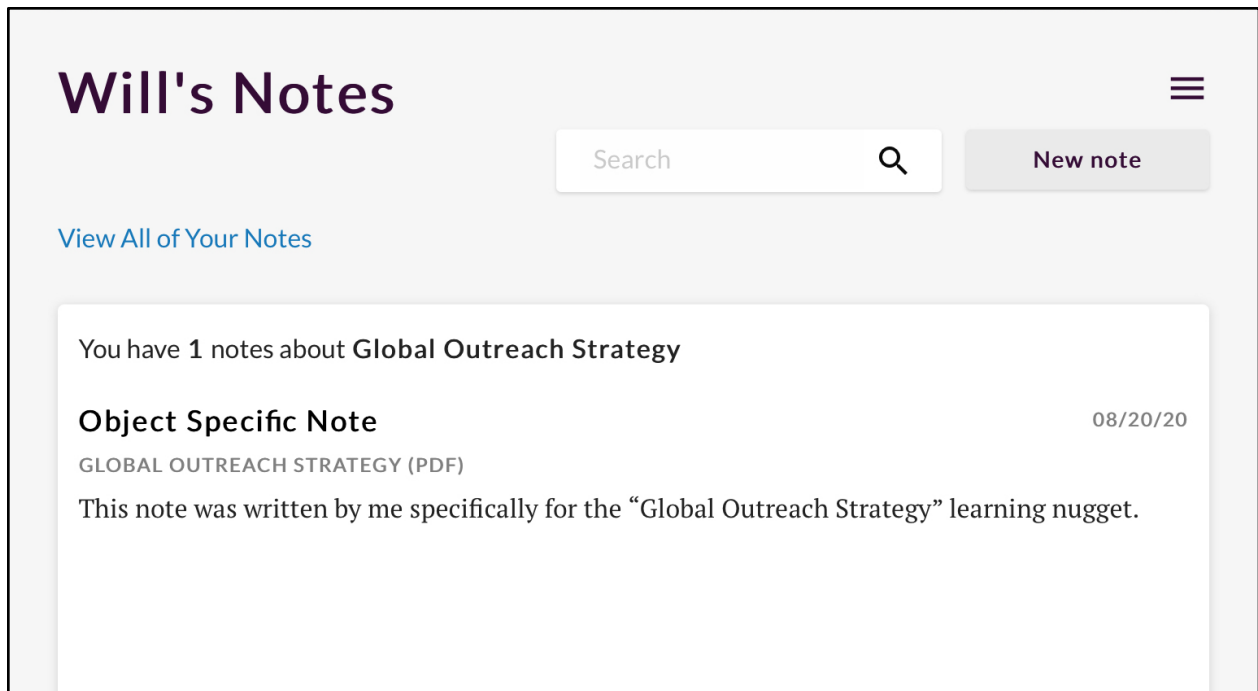


Figure 6: Notes option for a learning object

The flows to add a new note or edit an existing one are the same as those for general notes. Adding a New note here will automatically add the topic as the title of the content item the user is in; this sits between the note title and the notes text area. The **View All of Your Notes** option will take the user back to the All Notes view.

Notes Within PDF Learning Objects

The new notes functionality also allows users to add notes from within their PDF learning nuggets. While at the time of this guide's draft, this functionality is available only for PDF nuggets, further updates are planned for later releases to extend this to other object types.

If a user is using a mobile CellCast app that includes the required update, they will see a notes icon in the top right of their PDF view. Tapping this icon opens the notes view for this PDF nugget.

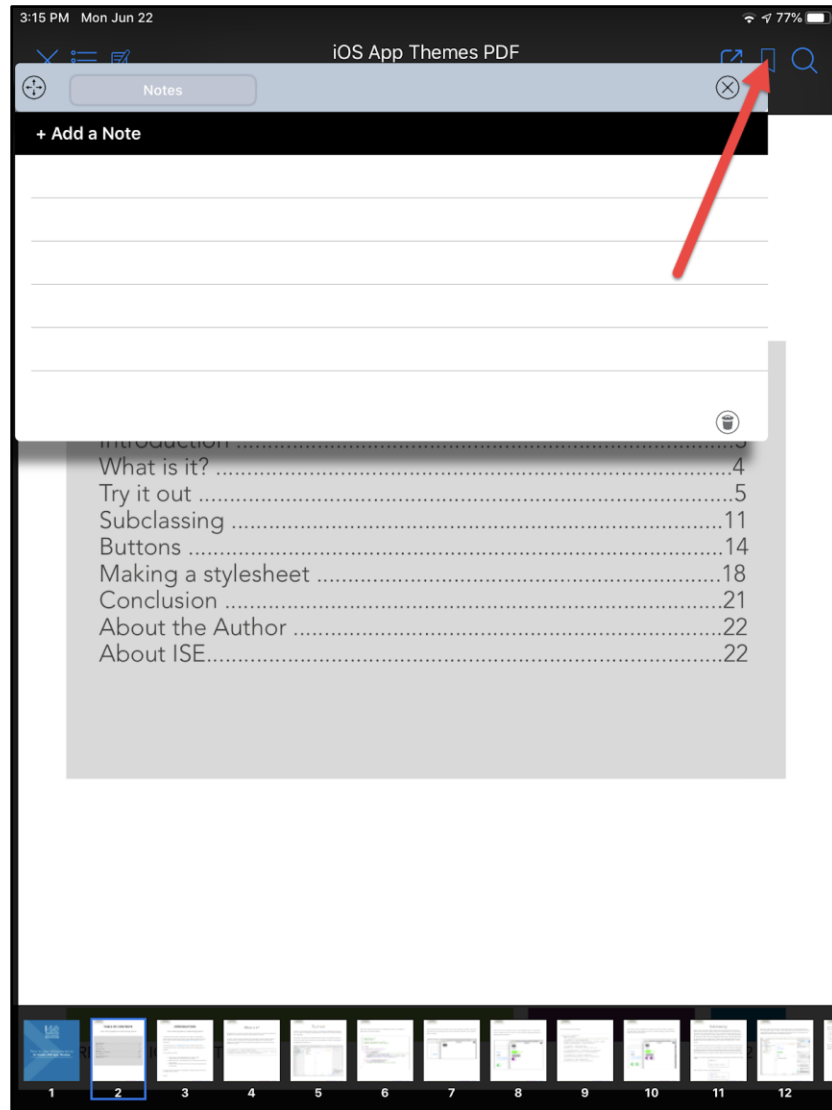


Figure 7: Notes view within a PDF nugget

All notes written here are captured and associated with the PDF nugget the same way as if the user had written the note through the UI. These notes appear in the notes list alongside all other notes and can be viewed and managed from that view.

Notes in OPCV

The existing Notes function within OPCV has been updated to integrate with the enhanced notes functionality. The button is now context sensitive such that if a user has an object open when they click the button, the Notes view will open to show the user's notes for that object. Likewise, if a user is viewing a content list, the Notes view will open to the general notes list instead.

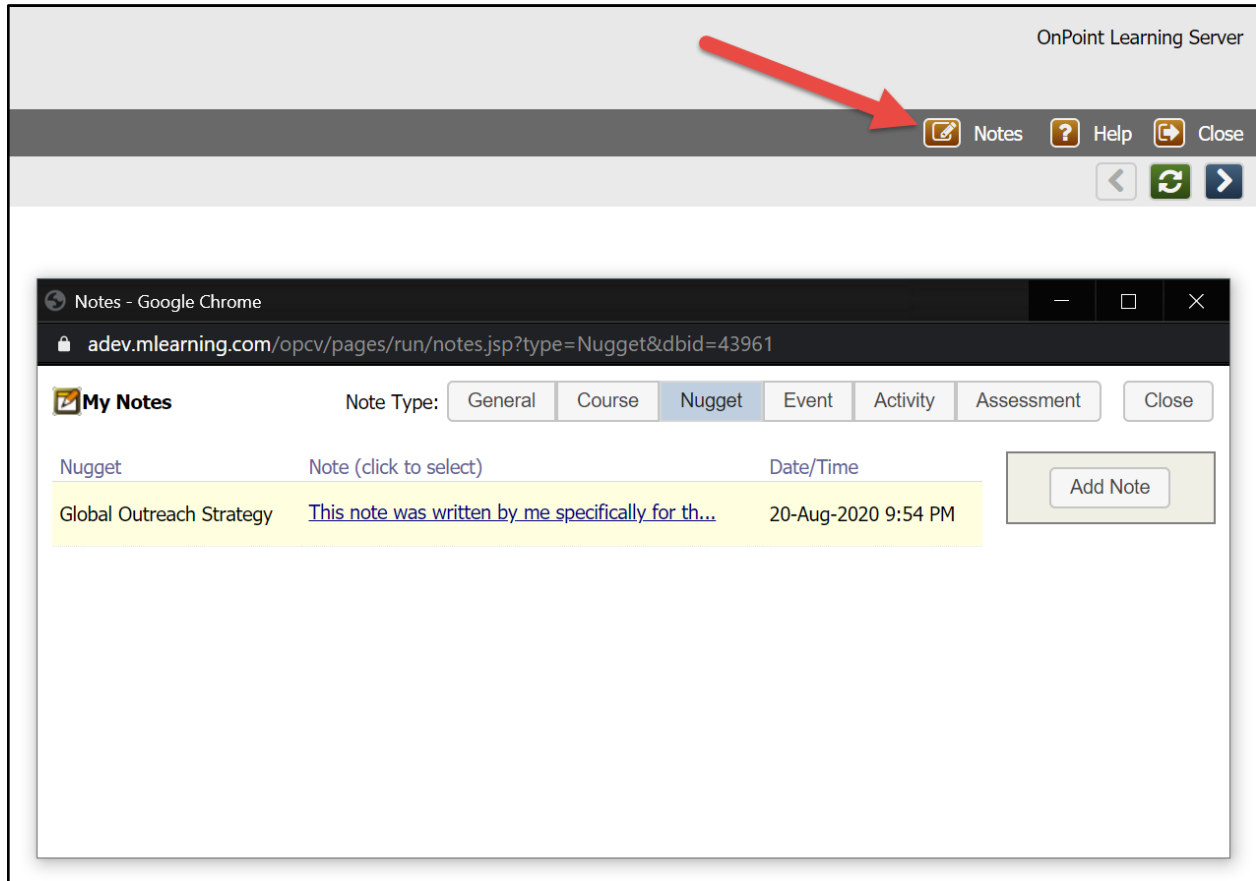


Figure 8: Notes option in OPCV

All notes added by the user in OPCV, in the UI, or within content are stored in the same manner and can be viewed from any of these locations.