

Bankway

WC 12-07

Metavante Banking Solutions

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## Introduction

The Multi-Media Development Guide, 2007-2008 is intended to give the reader a greater understanding of the department itself, and the standards, styles and procedures used to generate the highest-quality educational products.

This guide is not all-encompassing of the many fine details that go into such production. However, the guide should give any reader or new employee a reference that will enable more immediate indoctrination into the nuances and structure of the Multi-Media Department.

### *Bankway Education Multi-Media Department*

Bankway Education Multi-Media Department is a sub-division of the Educational Services Department of Metavante, Inc. Originated in 2005, the Multi-Media Department grew out of Metavante's desire to take banking education to even higher levels.

Already involved in wide-ranging education and training - including workshops, on-site classwork and customized documentation - the Educational Services Department has broadened its scope to include the modern-day banker and their needs. The Multi-Media Department focus includes *Awareness Training* - available online in pre-recorded, web conference sessions, and *Self-Paced Learning* - which includes Metavante's ***The Bank - The Basics of Bankway and Beyond*** - an interactive visual-media presentation and real-world simulation.

These instructional innovations allow for the busy and diverse schedules of our clientele, and provide more flexible and more varied education. In conjunction with Multi-Media, Metavante's Educational Services Department continues to set the standard for banking education and client satisfaction.



## Department Educational Goals

### Current Objectives

- To create effective learning on a contractual, annual basis that allows organizations to plan effective employee empowerment and readiness.
- To create a center for effective learning that allows organizations to examine long-range planning, compliance, issues of technology, leadership, and market readiness for - the immediate and foreseeable future.
- To create effective learning tools for developing and enhancing any organization through best practices, leadership, team-building and process-driven metrics and accountability.

### Long-Term Mission

- Bankway Educational Services will be renowned for quality learning experiences that stimulate business knowledge.
- Our vendor relationships will represent world-class organizations who desire to bring educational effectiveness to our partnership.
- The unequalled delivery of learning knowledge will create value for leaders and stakeholders in the organizations and communities that we serve.

## Methods of Education

### Self-Paced Learning

The Multi-Media Department's *Self-Paced Learning* tool, **The Bank - The Basics of Bankway and Beyond** was developed to meet the needs of the modern Bank and its employees. *Self-Paced Learning* allows the user to learn at their own pace, and at a time that fits within their schedule. This product is interactive, provides real-world simulation and exercises, and is specifically geared to make learning enjoyable, yet thorough.

### Awareness Training

*Awareness Training* is a unique educational strategy - geared to give the user ideas, concepts and "how tos" on a variety of banking and financial matters. Topics cover Marketing, Positive Pay, IRAs, Access to Information (A2i), Health Savings and much more. *Awareness Training* is a great way to acquire new ideas, and also learn a bit more about Bankway software and its capabilities.



## Self-Paced Learning

### Standards

Most of the standards included in this section are from *Metavante's Learning Redesign and Redevelopment Standards and Process Guide, v 1.07*. Most of these standards are intended for stock meeting presentations and the like. The Multi-Media Department makes every attempt to abide by these standards. At times, however, it is necessary to stray outside of these borders for the sake of creative flow, storyline and user needs.

### Written Elements

- **Body Text:** Should be sentence case. Only capitalize words that start a sentence or are proper nouns.
- **Punctuation:** No colons after stem sentences on slides
- **End of Lesson:** Use Metavante's exact verbiage/model, which has been propagated into ATM Management Systems (AMS), Card Management Enhanced Reporting, and Introduction to Bank Control courseware.
- **Miscellaneous Items:**
  - Standard stem sentence to be used for course intros
  - Spell out Metavante Insight; do not use the abbreviation MI
  - For web applications, the preferred interface term is page
  - For windows applications, the preferred interface term is window
  - For mainframe applications, the preferred interface term is screen
  - When referring to a Metavante client, the preferred term is organization, not institution

### Text

- **Font:** Arial font. Refer to the list below for more specific guidelines and exceptions.
- **Color:** Black - can have some exceptions – white on top of a dark image, etc.  
See the Color Palette in *Basic Graphic Elements Guide 2007*.
- **Headers:**  
Arial 20 BOLD, far left justified, very close to the "Getting Started" button.  
Use title case (initial caps) for screen titles and capitalize all words except for terms like **and, or, a, the, to, with**, etc.
- **Body Text:** Also Arial 20, not bold; Text in presentations should be extremely concise.

### Bulleted Items

It is important to use a consistent style for bullets. Follow the guidelines below when using bullets.

- Should be sentence case. Only capitalize words that start a sentence or are proper nouns.
- May use 16 or 18 font size depending on number of bullets and space available.



- For storyboard presentation, use a consistent bullet throughout entire course. Representation in final Flash-based deliverables will be decided by the Stratagem development team.
- Keep bullets together. Don't separate with images.
- There should be two (2) or more items to use bullets. Do not use a bullet for just one item.

## Voice and Tone

### Voice

The voice of all presentations should be *Active*. The actions that the user should take are always in the "here and now" - and the words used in the presentation, vocal or text, should reflect this. This rule applies to both vocal and written elements.

#### Examples:

- Incorrect: The main screen will now appear.
- Correct: The main screen appears.
  
- Incorrect: After entering the items, you will click on Next Page.
- Correct: After entering the items, click on Next Page.

### Tone

Whether or not a presentation has a prepared storyline, a short skit or voice-over narration, the tone of all Metavante productions should always be professional, yet friendly - and fun, with restraint.

## Visual and Design Guidelines

- Match Metavante's color palette as provided by Metavante in the Basic Graphic Elements Guide 2007 document.
- Lessons – repeat themes/colors/background images in order to have more consistency. Final determination of course and lesson look and feel will be decided by the Stratagem development team and approved by Metavante. Once the course and lesson look and feel is finalized, it will be used as the standard look and feel across the entire portfolio of Stratagem-designed and developed courses.
- Use the same slide for introducing course objectives and reviewing course objectives. Use the same end of the lesson slide for all the lessons in each course. Also, use the same very first welcome slide for all the courses. For the Final Assessment tab, the first slide in that section should have a heading of Summary, followed by review of objectives, and finally, the start of the Final Assessment.
- The first lesson in every course is titled Getting Started; the last lesson in every course is titled Final Assessment.
- The Final Assessment should not be indicated as a learning objective in the Getting Started lesson.
- For Final Assessments, in-lesson knowledge checks, and end-of-lesson Let's Reviews, a variety of questions is paramount. Do not overuse True/False questions. If using an assessment mechanism other than a 10 – 15 question quiz (for example, some type of game like Jeopardy), spec the assessment out in detail so Metavante can verify that it meets the needs of the instruction and the Stratagem development team has enough detail to successfully construct it.

When using an image to present a question, always use the grey question mark. This may not apply to drag and drop, puzzles, or click to build a picture.

- Feedback statements associated with in-lesson knowledge checks, end-of-lesson Let's Reviews, and end-of-course Final Assessments must do more than repeat the question. They must be varied, and offer teaching moments and knowledge reinforcement.
- Feedback will be triggered by a mechanism called Check Your Answer that will validate learner response and trigger the appropriate feedback (verbiage and visual representation to be determined by Stratagem development team and approved by Metavante).
- Feedback for in-lesson knowledge checks and end-of-lesson Let's Reviews will be auditory and visual (textual on-screen feedback and voice over). Feedback for Final Assessments will be visual only (textual on-screen feedback).
- Ideally, learning objectives in active voice will match the tabs on the interface. However, due to space constraints associated with the tabs, some compromise may be necessary and you may need to trim the verbiage on the tab.
- Boilerplate text wherever possible in courses.
- Simpler screens – strive for 3 maximum items onscreen at one time
- Based on instructional demands, it may be necessary to omit or deemphasize source content when designing the self-study course. Because the source was designed for one-off, instructor-led presentation, there may be information that was originally included that is not suited for use in the redesigned self-study course. If you are omitting or deemphasizing source content in the self-study course, insert a **Note for Metavante Review**: into the storyboard and articulate your rationale for omission or lack of emphasis so Metavante can account for, and understand, the differences during review.

## Graphics / Images

Images are an important part of the overall presentation of each lesson and module. Select and incorporate images carefully using the guidelines below.

- Choose images that:
  - Fit the environment
  - Tie to the content
  - Do not have any potentially inappropriate or negative connotation
- A drop-shadow underneath an image is not always necessary. If you do use one, make sure it isn't strong in color. Medium grays are a good choice. Whatever is chosen, there should be a consistency throughout the presentation.
- Select images that are conservative and business-like, to match Metavante's demographic.
- Do not use bright colors; pinks, reds, blaze oranges, etc. Prior to incorporating an image, look at colors, hairstyles, attire, background setting, etc. to determine whether it fits the demographic. If it looks too casual, it probably is. (exception - sometimes a non-business image is used with a business "story," e.g. the bakery woman).

### Clip Art

Cartoon-ish Clip Art should not be used in any productions of the Multi-Media Department. Some Clip-Art may be used, but it should be done so sparingly.

### **Metavante Stock Images**

Stock images for use in any work within the Educational Services Department can be found at the following link:

[http://unlimited.photostogo.com/store/welcome\\_lookup.asp](http://unlimited.photostogo.com/store/welcome_lookup.asp)

- Contact Educational Services' Educational Facilities Coordinator and Registrar for username and password information.
- Download all images desired into the *Educational Services \ Graphics* folder, and manipulate them from that point, if necessary.

### **Graphic Design Elements**

- Graphic Design Elements such as templates, backgrounds and so forth, generally have to be approved by the Marketing Department, or issued by them directly.
- Design elements within the scope of the presentation do not need such approval. However, as with other elements, consistency of look, coloring, and tone should be kept in mind.

## **Demonstration and Simulation**

When providing information to be applied in a demonstration or simulation, use the following guidelines.

- Information should always appear in "post-it" style.
- Demonstration callouts should be yellow, square boxes with 12 point font. Font size may need to vary based on amount of information requiring presentation.

**Recommendation:** Use an image of a mouse/keyboard to let learners know that they need to click on something vs. type something. This can be introduced as a part of *Getting Started*.

- Onscreen simulation instructions should be rendered in a powder blue, square box with 12 point font. Title "Information You Can Use" should be rendered in Arial 14 bold, centered.

## **Naming Conventions**

### **File Naming**

When creating/editing documents, presentations or other files:

- Include the date at the end of the file.
- Do not use spaces in between words. If you use a capital letter for the beginning of a word, this will create enough emphasis.

**Example:** The Back Office Release is titled **BackOfficeFallReleasex17\_11-27-07**. If you need to use a space, please use an underscore ( \_ ).

Examples of **UNACCEPTABLE** file names:

- Training Guide Fall ReleaseV2 11.15.07 (which area- V2?)

- Revisions To Manual 11407 (What manual?)
- Fall Release Training Guide (Again, which one? Please consider others when naming these files)
- Fall Release User Guide for Back Office Operations and General Ledger 11.15.07 (please do not write a paragraph for a file name - it will eventually corrupt the file)

### Miscellaneous

- All release guides and web-based training guides will be named a PARTICIPANT GUIDE - not User Guide - not Participant(s) Guide.
- Delete old files. There should only be 2 files, the new file with the new date and the last file updated with the previous date.
- Always maintain at least one backup file.

### Titles, Headings, Labels

*Titles, Headings and Labels* in a presentation, like other elements, should have a consistency of tone, tense and clarity that flows from the beginning of the piece through to the end.

- **Titles** should include the global name of the presentation and any sub-title that might give more specific meaning to the nature of the work.

**Example:** The Bank - The Basics of Bankway and Beyond. *The Bank* is the main title of the work and *The Basics of Bankway and Beyond* is a sub-title.

- The title may also include the name of Metavante. This is not necessary, but the Metavante logo should be on the main page or screen, at a minimum.
- **Headings** and **Labels** should be very short and to the point. Most should be only one or two words.
- Headings should be hierarchical. The largest heading should be the most all-encompassing. From there, sub-headings should continue to break down the components that constitute the largest heading.

## Procedures

### The Design and Development Process

To ensure that all project team members are familiar with their responsibilities, a recap of the joint Metavante/Stratagem courseware design and development process is as follows:

- Prior to submission of any course content to Stratagem, Metavante will ensure that all source materials (virtualls, PowerPoint decks, etc.) are accurate, inclusive of all information related to the topic, and are in their final state.
- When Metavante submits course source material to Stratagem instructional design resources, Jodi or Lisa will flag the course as Gold, Silver, or Bronze.
  - **Gold:** Content and flow indicated within the source material are pre-approved by Metavante for direct incorporation into the self-study storyboards. Minimal content rechunking and reworking. Work on the course primarily consists of adding learning interactions, activities, and constructing the final assessment.
  - **Silver:** Flow of the course should be appropriate, but may need to be tweaked to ensure successful learning. Content is accurate, but may need to be rechunked and reworked to map to redesigned flow. Work on the course also consists of adding learning interactions, activities, and constructing the final assessment.
  - **Bronze:** Flow of the course requires design expertise. Content is accurate, but may need to be rechunked and reworked to map to redesigned flow. Work on the course also consists of adding learning interactions, activities, and constructing the final assessment.

**Important:** Due to tab limitations inherent in the Metavante shell interface (8 total), some compromises on flow may still need to be made. Stratagem and Metavante will work together to address these situations on an ad hoc basis.

- For instructor-led webinar courses, Metavante will record the course for ongoing and repeat viewing by Stratagem resources during design and development. If recording of the course is not possible, Metavante has arranged for Stratagem resources to attend a live version of the course as a silent participant. Metavante will directly schedule Stratagem participants for live classes.
- Stratagem resources will review all Metavante-provided source materials and recorded courses during design and development, but will trust that all material is accurate, inclusive, and final, and will use content as-is.
- Approximately 1 – 1 ½ weeks after a Stratagem Instructional Designer begins working on a course, the Designer will have a focused consulting discussion with the Subject Matter Expert (SME) or Trainer responsible for the course. This session is a forum for the Stratagem Instructional Designer to ask the SME/Trainer any applicable questions regarding the course, subject matter, possible system accounts, data, or examples to be used in the self-study, and any system tips, tricks, or hints that may benefit Stratagem's work. Metavante is in-process of scheduling these consulting sessions in-line with the project plan.
- In the event that additional questions or open issues arise regarding course subject matter and SME intervention is required, the Stratagem Instructional Designer will submit those questions in writing to the SME or Trainer responsible for the course (cc'ing the Stratagem Project Manager and the Metavante Project Manager). If the SME or Trainer does not respond to the Instructional Designer within 2 business days, the Designer will contact the PMs, who will then discuss the optimal way to get those questions answered/issues closed and will communicate appropriate next steps to the Designer.

- The first design deliverable Stratagem produces for each course will be a high-level outline detailing the module/lesson/topic structure for the specific course. This outline will be submitted for Metavante analysis and review, and once approved, will be the blueprint for final architecture of the course. This is being done to minimize the possibility of downstream lesson and topic restructuring. If, during course development, any issues arise that affect the lesson order or overall course structure, Designers will re-submit any recommended changes for Metavante approval.
- Instructional and visual design of courses and lessons will be done in-line with the Metavante-approved "future state" storyboard dated 5/31/07. The Stratagem Instructional Designers/developers will indicate on-screen text and images, make suggestions for background images, and write detailed technical notes and voice over scripting in the storyboard.

**Note:** The new storyboard format removes the bulk of the aesthetic mockup and leaves those final decisions (palette, placement of images, on-screen content layout, etc.) in the hands of the Stratagem development team. As the first course is completed, Metavante will have the opportunity to comment on the aesthetics. Coming out of the completed first module, we will have an established look and feel that we will propagate across the entire portfolio of courses (in effect, productizing and branding the entire offering).

- As course lessons are designed, developed, and completed (in separate Microsoft PowerPoint files), they will be submitted for internal Stratagem instructional and content review. All relevant feedback will be incorporated into the PowerPoint files. All unanswered questions and open issues within storyboards will be closed **prior to** submission to Metavante.
- Completed, post-Stratagem internal review lessons will be submitted to Metavante for instructional and content review via Sharepoint. Metavante will review each lesson as soon as possible (but no later than the end date for Metavante design review, feedback, and approval indicated in the project plan), embed all relevant feedback into the PowerPoint files in red, and send to Stratagem for incorporation.
- Once Stratagem incorporates Metavante instructional and content review feedback into each course, the entire course will be submitted to Metavante for final training content signoff via Sharepoint.
- Upon Metavante final training content signoff, the course will be moved to the Stratagem development team and Flash, Captivate, and voice over audio production will be completed.
- Upon completion of Flash, Captivate, and voice-over audio production, the completed course will be submitted for internal Stratagem review (to both Jennifer Fauls and the Instructional Designer responsible for creating the course) to ensure that all functions of the course work properly, such as back and next buttons, all interactions and demos work properly, and that content is in accordance with Metavante-approved storyboards. All feedback will be incorporated.
- Completed, post-Stratagem internal review courses will be submitted to Metavante for Flash/Captivate review. Metavante will review each course in accordance with the dates for review indicated in the project plan, and will send all feedback to Stratagem via e-mail for incorporation.
- Once Stratagem incorporates Metavante feedback into each course, the entire course will be submitted to Metavante for final Flash/Captivate signoff via Sharepoint.
- Upon Metavante signoff in step 15, the course is complete.

## The BANK

### Introduction to The BANK

**The Bank** - *The Basics of Bankway and Beyond™* is the most innovative learning tool in today's banking industry. **The Bank** is specifically designed to assist in the learning of the *Bankway™* Browser system. This self-directed program has an interactive visual-media component with an accompanying participant guide. Together, these items provide a real-world simulation that maximizes the learner's knowledge of *Bankway™*.

**The Bank** is intended to make learning more enjoyable - through the interplay of audio, visual and interactive components. This enables thorough learning - whether the user is a visual, audio, motor or tactile learner.

### **The Bank – The Basics of Bankway and Beyond™ – The Series**

The following are the eight disciplines of *Bankway™* Browser that **The Bank** will eventually cover. As of December of 2007, the first three of these modules are complete and have been released.

1. **Navigation and Customer Information Basics**
  2. **Teller Basics**
  3. **Customer Service Representative (CSR) Basics**
  4. Loan Operation Basics
  5. Loan Servicing Basics
  6. General Ledger Basics
  7. Deposit Operations Basics
  8. Executive Training
- } Released - December 2007

Each module is approximately 2-3 hours in length and may be used in one, full session - or broken up into smaller segments. This may be determined by the user's available time. The system will "bookmark" where the user left off, making it easy to resume quickly. Each module includes discourse, demonstrations and reinforcement - with user practice sessions and with quizzes. Users are able to work within simulations, interact between the course and their participant guide - and even try to "beat the clock" in some exciting activities.

## Software Design Parameters

### PowerPoint

PowerPoint is used to drive the presentation element of each module. The following parameters should be adhered to when designing or adapting any material within ***The Bank – The Basics of Bankway and Beyond™***.

### Instructional Content

Each module of ***The Bank*** will contain a basic introduction segment. The manner in which this introduction is administered may vary, but some essential elements should always be incorporated.

- Warning about *Flash* settings and directions on how to configure
- Warning about *Pop-Up* blockers and directions on how to disable
- Title slide for ***The Bank***
- Title slide for individual module
- Information about presentation interface (tabs, attachments, e-mail, and full-screen)
- Information and link to download the participant guide
- Phone number and e-mail address for assistance
- Course objectives

### Font Sizes & Colors

PowerPoint master styles are based on the Metavante standards.

- Title Font: Arial Narrow 40 pt
- Bullets: Squares
- 1<sup>st</sup> level bullet: Arial 32 pt
- 2<sup>nd</sup> level bullet: Arial 28 pt

### The Bank Standards

- Title text should be driven by the color scheme of the presentation.
- Body text is black, unless this doesn't mesh well with the background.
- Not all modules in ***The Bank*** will have the same backgrounds and color schemes. However, the visual content should be consistent within itself.



### Screen Captures

- Captures displayed in PowerPoint should be 7.5 X 10 inches or equivalent to a full-screen image.
- When capturing a *Bankway Browser* screen, make your internet browser full screen (**F11**). Also, hide your taskbar at the bottom. This will give you greater resolution on your capture.
- If *Snag-It* is used for capture, see the *Snag-It* instructions for capturing for best quality.

### On-Screen Transitions

The following details cover about 80% of situations. Use best judgment in creating a varied, yet controlled presentation.

- *Articulate (discussed in next section)* does not support transitions between slides
- If you use magnification to show a piece of the screen, it should **fade in** with a speed setting of **Fast**.
- If you have a bullet list on the screen, fade each item with a speed of **Fast** - as you speak about it.
- Don't overuse transitions. Generally - more conservative use of "special effects" results in a more appealing presentation.
- If animating highlight boxes on the screen, use a wipe down or wipe up. The box should be red (unless you are using a red color scheme) - it should contrast all other colors in the scheme.
- If applying text on top of an image background, use a colored text box (probably white) with a 50% fade, so the background shows through a little.
- We use a striped right arrow to identify the *Next Slide* button. In *The Bank* - Module 1, it was RGB of R=0 G=0 B=153. This should be consistent through your entire presentation.

### References to the Participant Guide

A constant reference to the participant guide should be maintained throughout the presentation. This reference is placed in the upper, right corner of the screen. Verbal references should be maintained, as well.

Use Arial 12 and the RGB of R=0 G=0 B=153 for coloring. These parameters are flexible - and should match the colors of your presentation.

Do not use book references on screens with a full-size screen capture.

### Simulation Slides

When the presentation launches a simulation, the simulation opens in a separate browser window. Therefore, the user needs to be notified of when this is occurring. The presentation should have a standard slide every time this event occurs.

This slide should visually and verbally identify:

- That the user is entering a separate browser window
- That the current portion of the presentation will be paused
- When the user is done with the simulation, they should come back to the main presentation and click the *Next Slide* button to advance.

**Participant Guide Slides**

Like the simulation slides noted above, the participant guide slides should follow the same general guidelines. Any time the user is going to be working in the participant guide, they should be notified with a standard slide. The user should be instructed on any details that will help them find the relevant section in their book.

**Test Review Slides**

Test review slides are the very next slide in play - after the user completes a test in the participant guide.

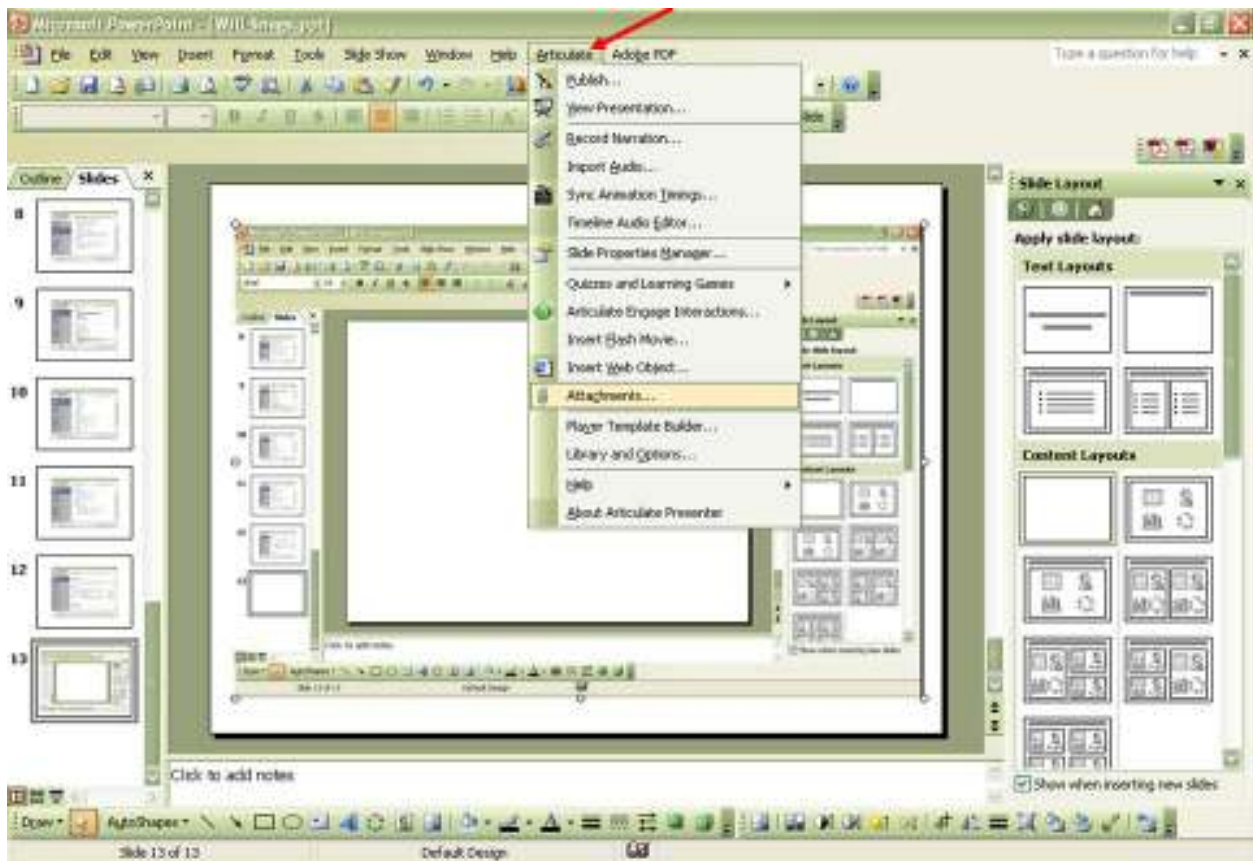
The following details are critical in the creation of test review slides:

- An audio intro - such as “Welcome Back! How do you think you did? Let’s take a look at your answers.” This should be a standard slide.
- Review of answers. Paraphrase each question and provide an answer. When possible, use the same images from the book.

## Articulate

*Articulate Presenter* lets users create e-learning courses by adding narration and interactivity to a standard *PowerPoint* file. These presentations can then be transformed into a *Flash*-based course. *Articulate* imbeds itself through *PowerPoint* and can be accessed via the *PowerPoint* menu bar, under *Articulate*.

### The Articulate Menu - within PowerPoint



## Articulate Settings for The Bank

### Library and Options

Access *Library and Options* under the *Articulate* menu.

### Logo

1. After opening the *Library and Options* sub-menu, the screen below will display.
2. To apply the appropriate logo to the finished presentation, click the **Add** button on the right. From this point, search for the desired logo.
  - As of December 2007, the logo in use for **The Bank** is 'The BANK Logo20.'



### Presenters

1. After applying the logo, click the **Presenters** button on the left of the *Library and Options* screen.
2. Click **Add** to open the screen below.

**New Presenter**

articulate PRESENTER v5

**Presenter**

Enter information about the presenter.

**Name:**

|

**Title:** **Email:**

Presenter **bio:**

**Photo:**

**Image options**

- Maintain aspect ratio
- Stretch to fit

No image available

Browse...

OK Cancel

3. Enter the following information:
  - **Name:** Metavante Banking Solutions
  - **Title:** Educational Services
  - **Email:** education@Metavante.com
4. Click **OK** when finished.

This information will display in the finished presentation just below the main title and above the levels display. In other words, this will act as a sub-title.

### Quality

1. Next, click the **Quality** button on the lower right of the *Library and Options* screen.
2. Make sure that the compression is optimized for web delivery -- choice # 1.

This setting is for internet-based applications. If creating or saving a module of **The Bank** to CD-ROM, then select option # 2.

3. Click **OK** when finished. This will exit the *Library and Options* menu.



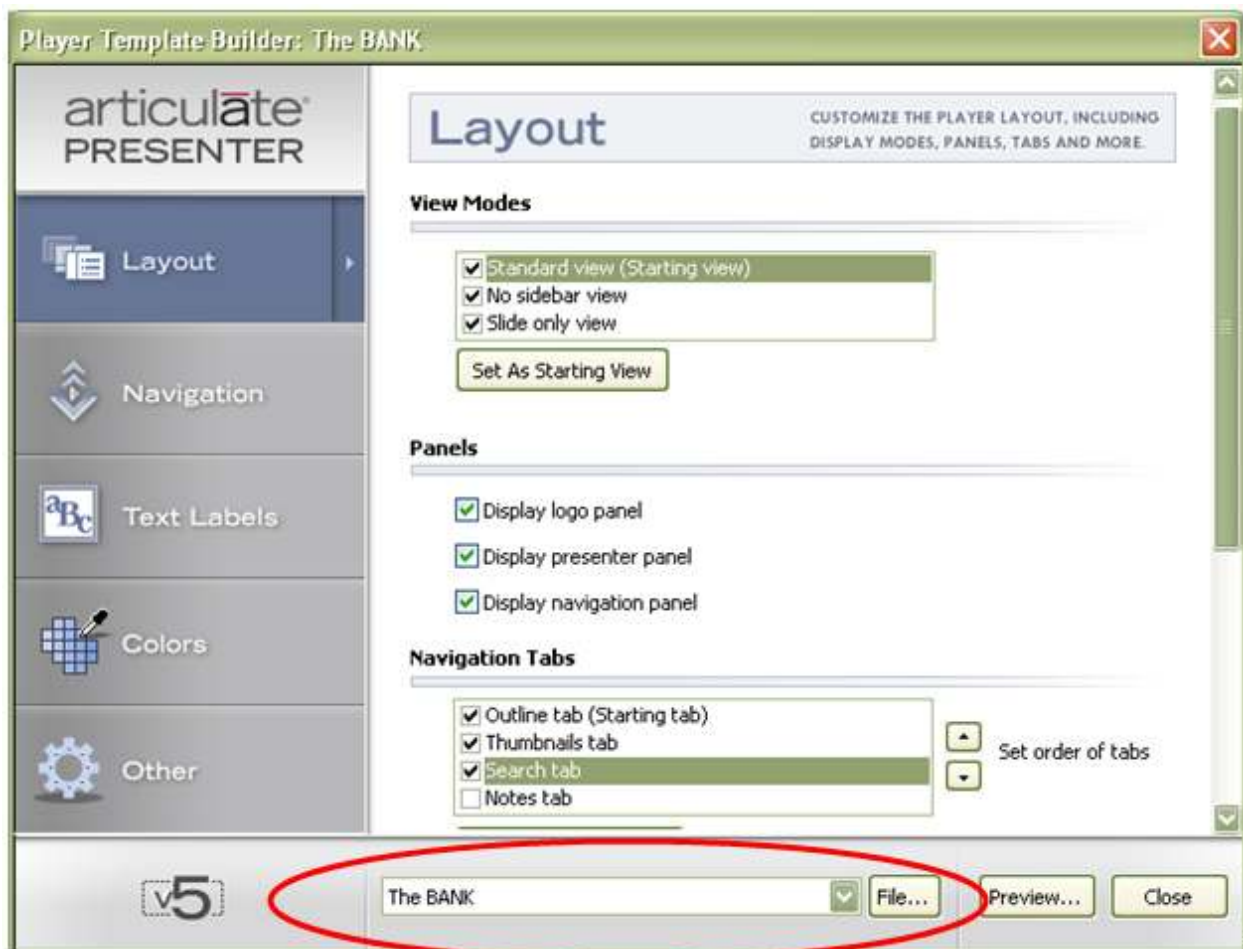
## Player Template Builder

Access the *Player Template Builder* under the *Articulate* menu.

### Series Template

1. At the bottom center of the *Player Template Builder* screen is a drop-down menu for attaching templates.
2. If not already applied, attach the template 'The BANK' to the *Player Template Builder*.

Using the same template for each module within the series will ensure that a consistency of presentation is maintained.



## Layout

1. Layout is the first option under the *Player Template Builder*. If not active, click the **Layout** button on the upper left of the screen.



2. Apply check marks to the following:

### View Modes

- ✓ Standard view
- ✓ No sidebar view
- ✓ Slide only view

### Panels

- ✓ Display logo panel
- ✓ Display presenter panel
- ✓ Display navigation panel

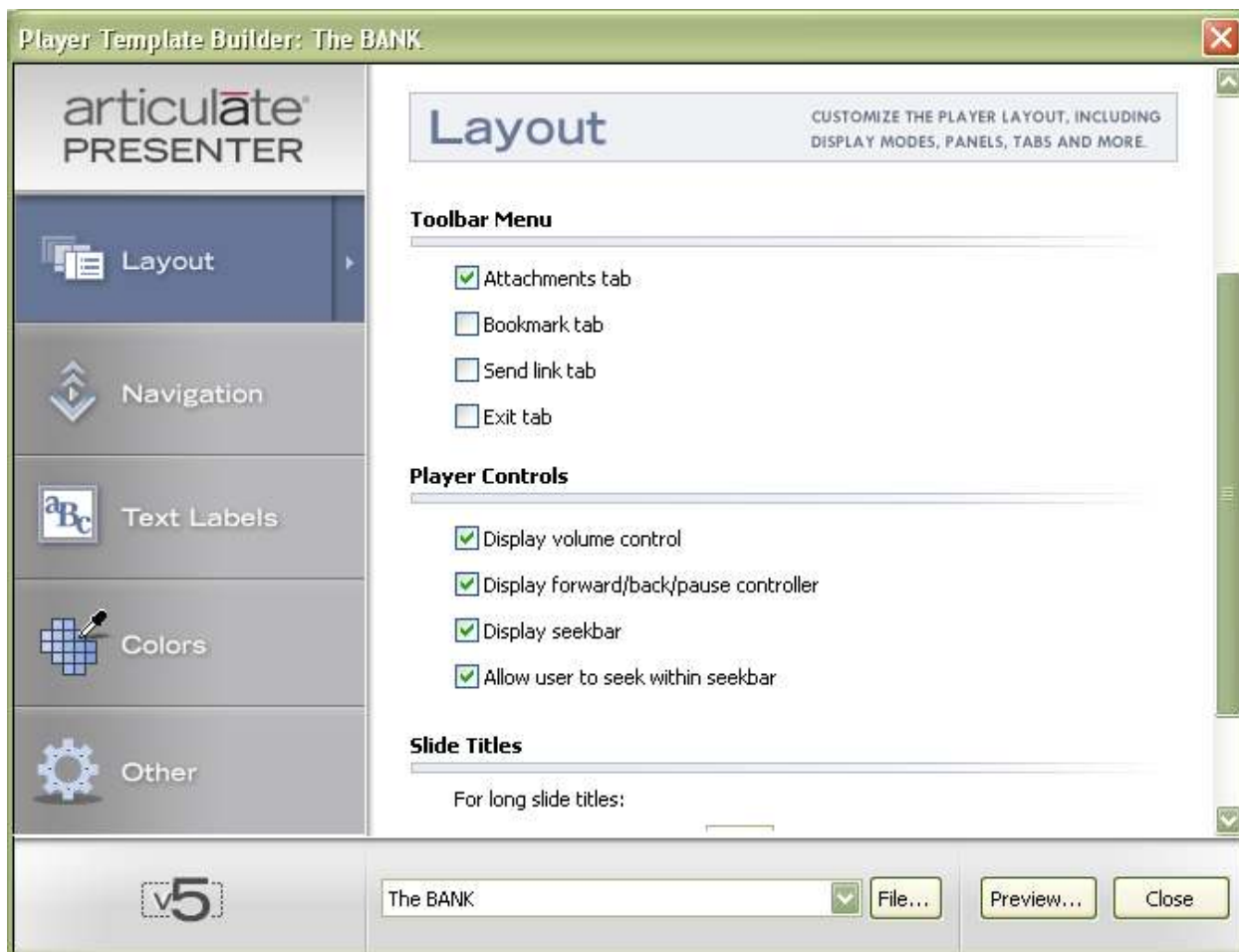
### Navigation Tabs

- ✓ Outline tab (Starting tab)
- ✓ Thumbnails tab
- ✓ Search tab

DO NOT apply the *Notes* tab.



## Layout - cont'd

**Toolbar Menu**

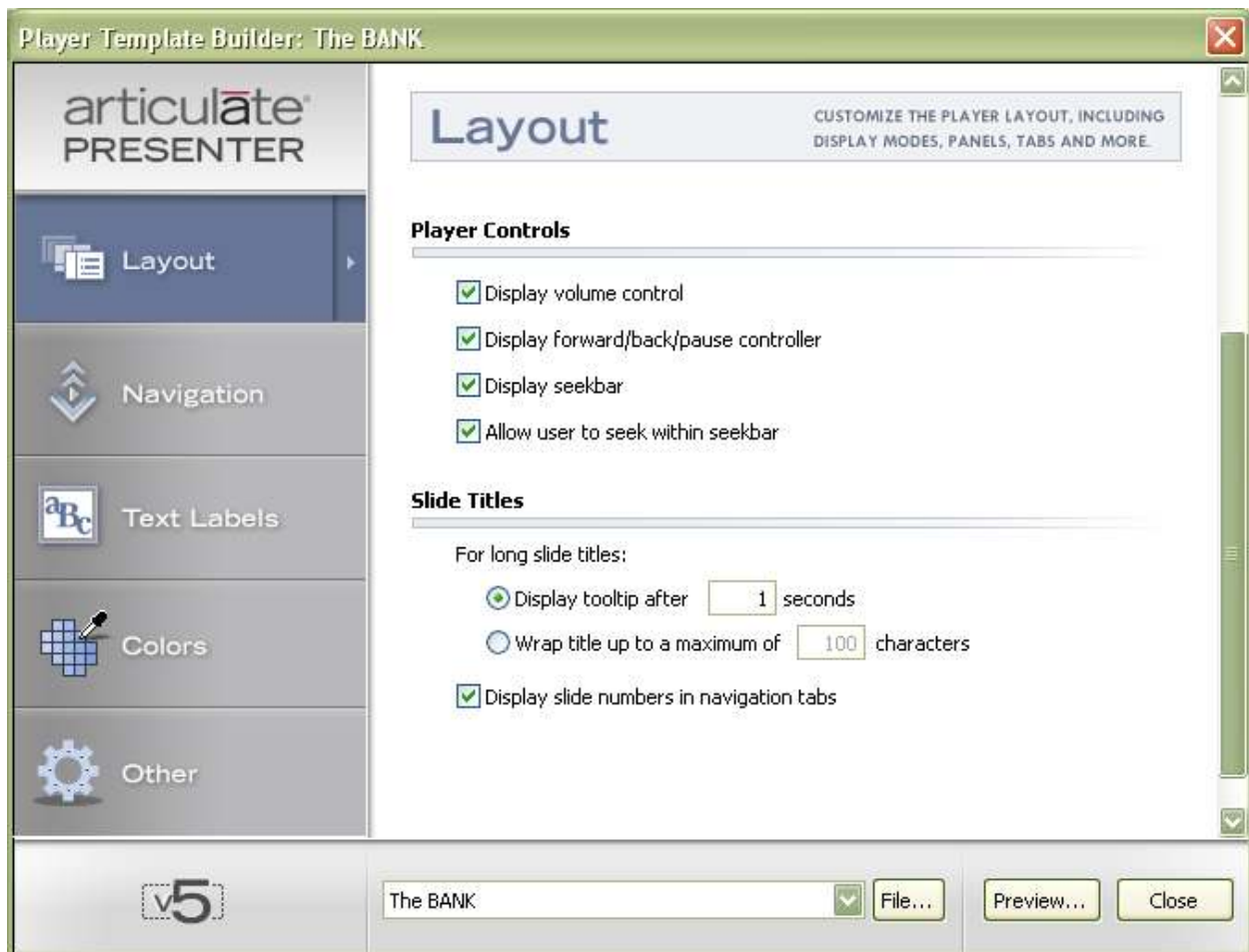
- ✓ Attachments

DO NOT check *Bookmark*, *Send link* and *Exit* tabs.

**Player Controls**

- ✓ Display volume control
- ✓ Display forward/back/pause controller
- ✓ Display seekbar
- ✓ Allow user to seek within seekbar

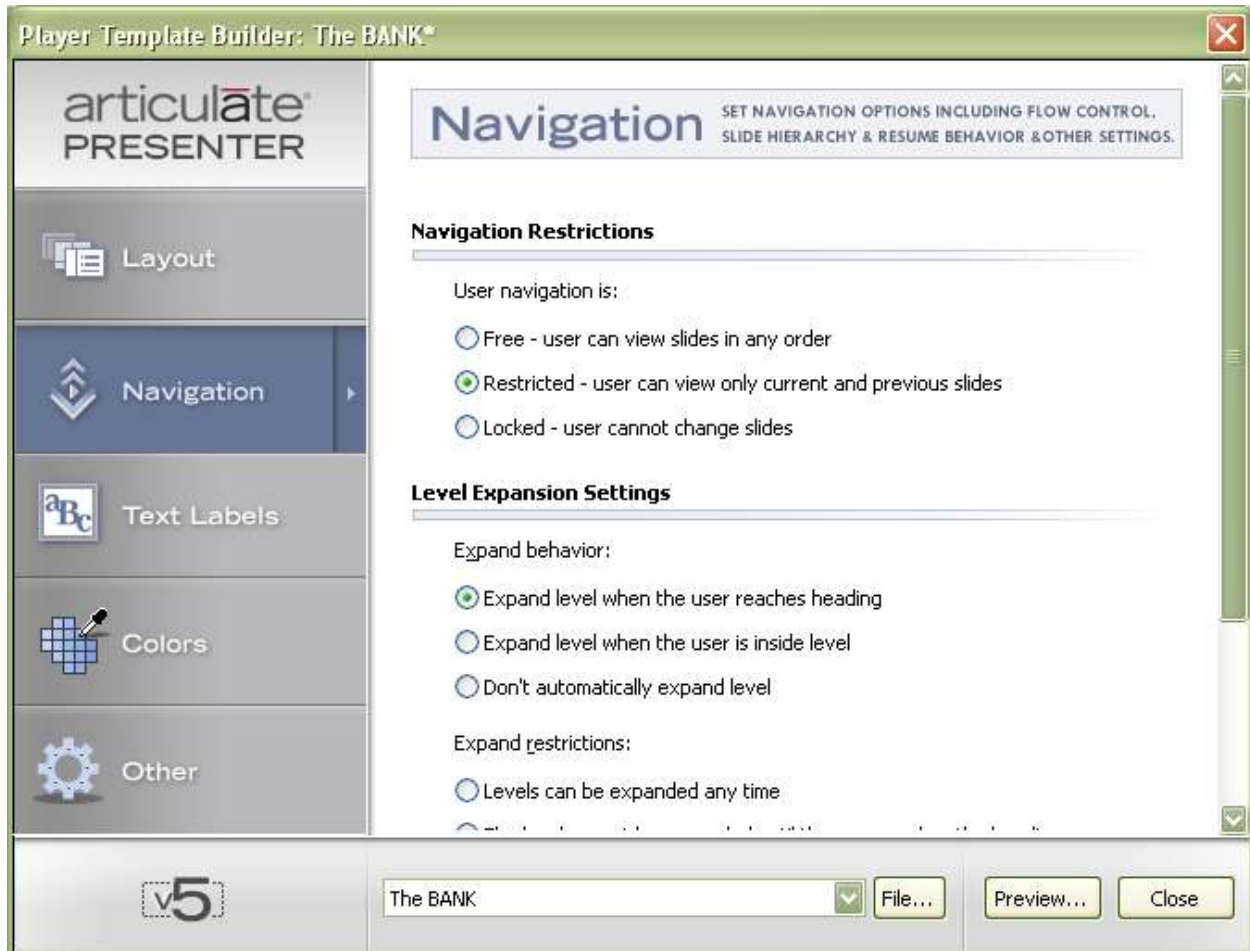
## Layout - cont'd

**Slide Titles**

- ✓ Display tooltip after [ 1 ] seconds
- ✓ Display slide numbers in navigation tabs

## Navigation

1. Navigation is the second option under the *Player Template Builder*. If not active, click the **Navigation** button, located below the **Layout** button.

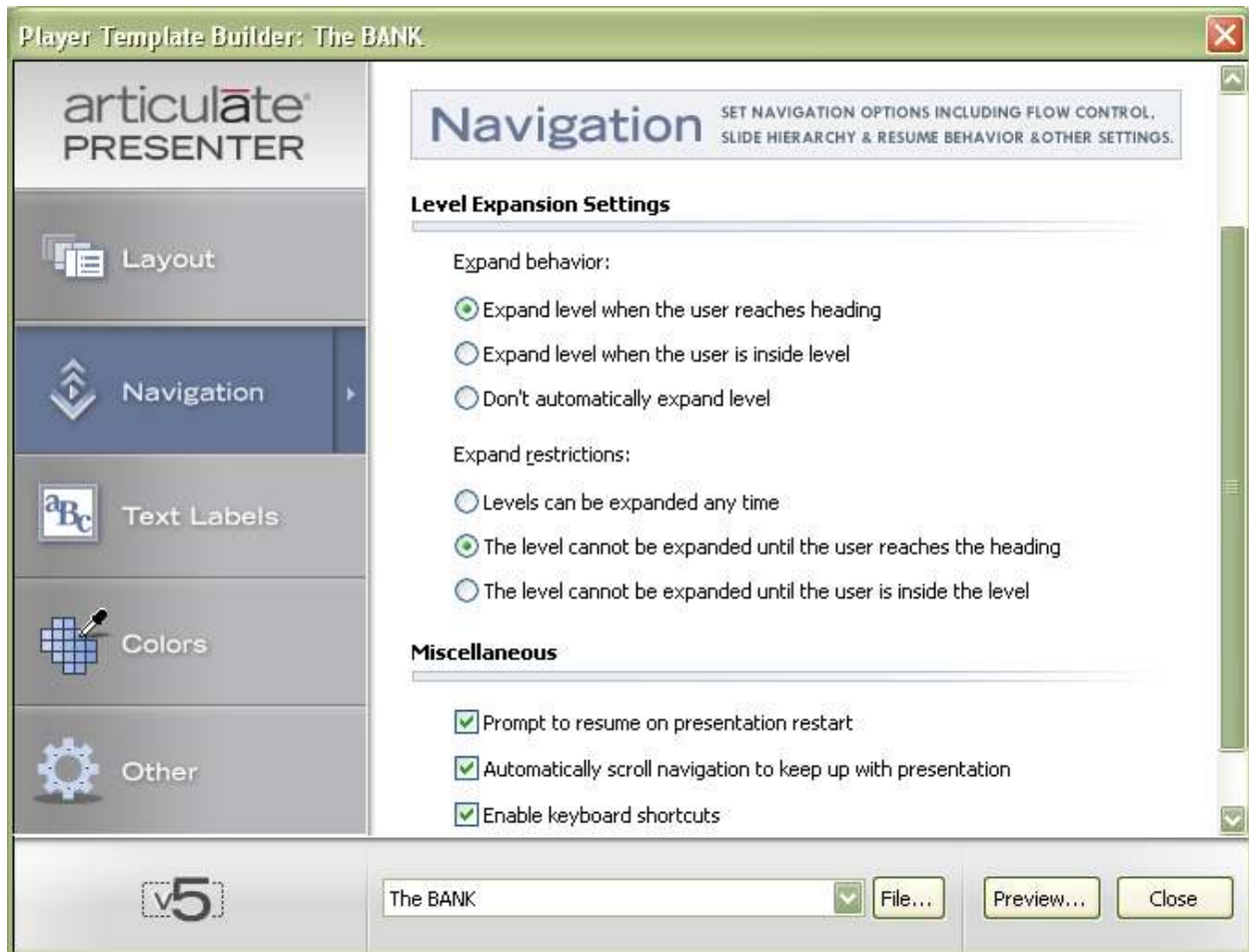


2. Apply check marks to the following:

### Navigation Restrictions

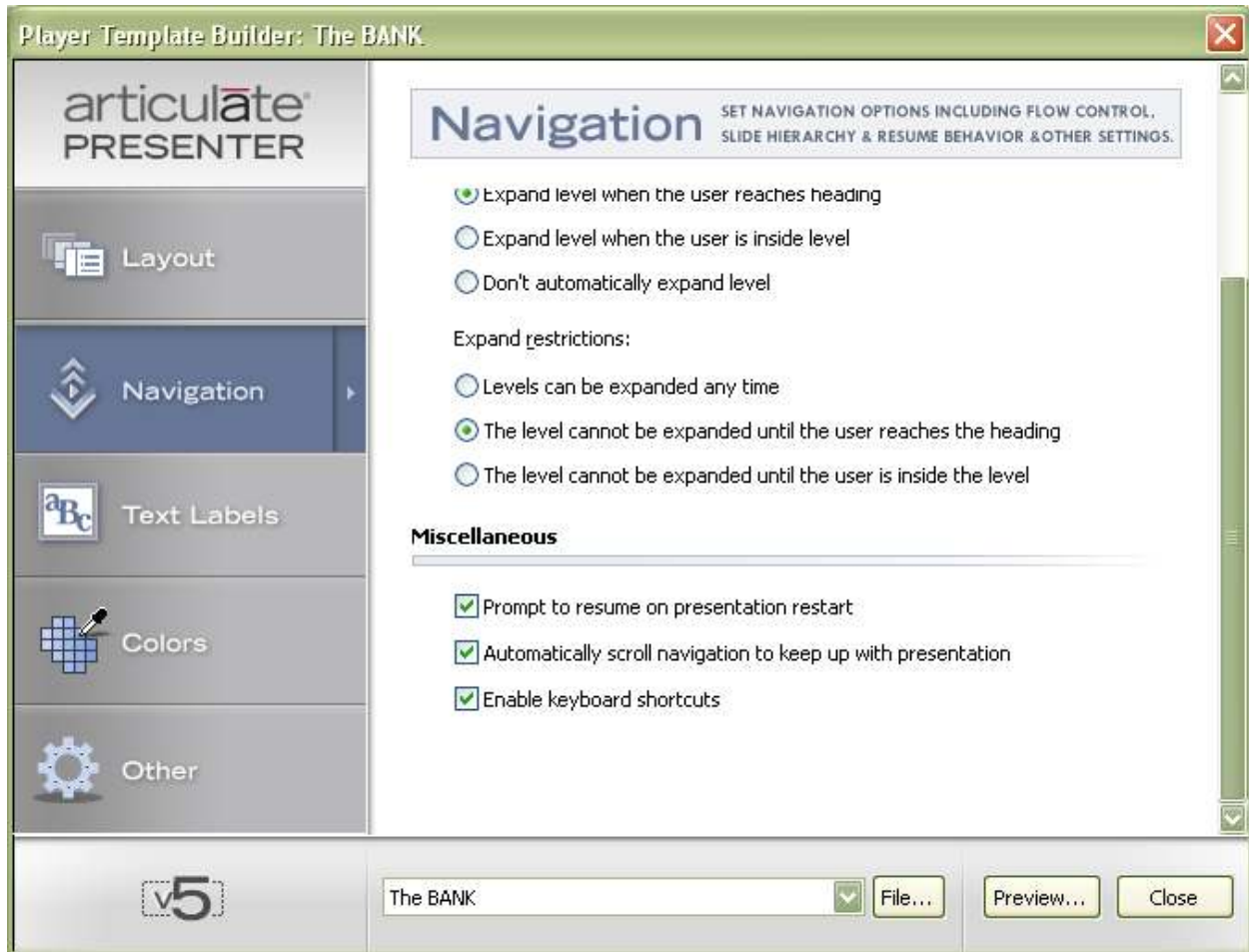
- ✓ Restricted - user can view only current and previous slides

This setting is for the final publish. Until that time and while testing the product, check *Free - user can view slides in any order*. This will allow for easy editing until the final is ready.



### Level Expansion Settings

- ✓ Expand behavior: Expand level when the user reaches heading
- ✓ Expand restrictions: The level cannot be expanded until the user reaches the heading



### Miscellaneous

- ✓ Prompt to resume on presentation restart
- ✓ Automatically scroll navigation to keep up with presentation
- ✓ Enable keyboard shortcuts

## Colors

1. Colors is the fourth option under the *Player Template Builder*. Click on the **Colors** button to open.



2. With **The Bank** template already in place, the color scheme should already be assigned to 'Blue Light.' If it is not, click on the drop-down menu and select 'Blue Light.'

### Other

1. Other is the fifth option under the *Player Template Builder*. Click on the **Other** button to open.



2. Apply check marks to the following:

#### Other

- ✓ Display elapsed and total presentation time

3. Make sure the following are selected:

#### Browser Window Settings

- ✓ **Browser size:** Display at user's current browser size
- ✓ **Presentation size:** Scale presentation to fill browser window

**Publish**

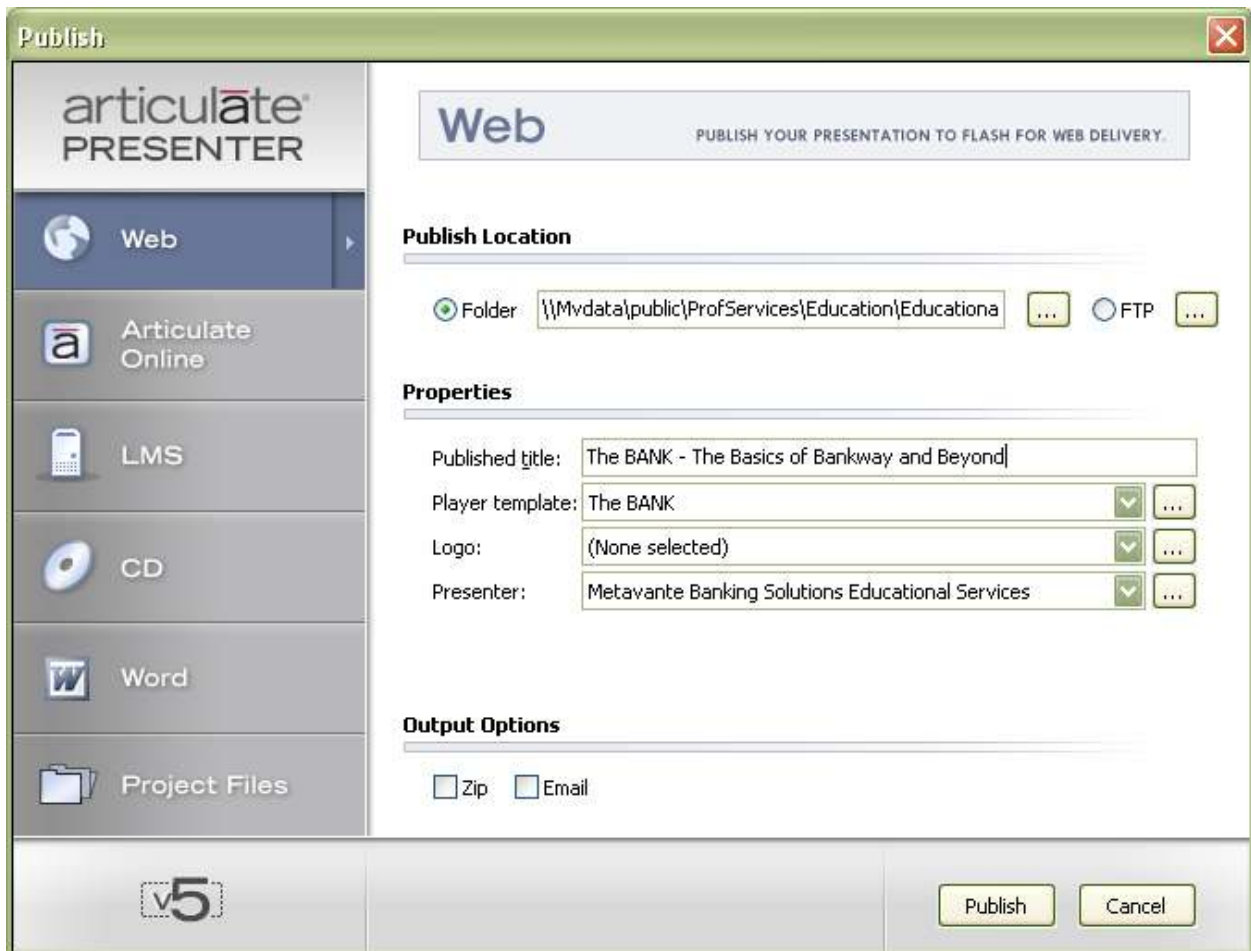
Access the *Publish* under the *Articulate* menu.

You may publish your presentation through any of the six available mediums listed down the left-hand side of the Publish screen - *Web*, *Articulate Online*, *LMS*, *CD*, *Word*, *Project Files*.  
The large majority of the time, publishing for **The Bank** will be to the *Web*.

*Publishing to the Web*

1. Select the **Web** button to open the Web Publishing options.

*Web* will publish your presentation to Flash for web delivery.





**Publish Location:**

2. Select the folder you wish to publish your presentation to.

**Properties:**

3. Enter the desired title in the *Published title* field.  
For **The Bank**, the title should be “*The BANK - The Basics of Bankway and Beyond.*”
4. The *Player template* should already indicate ‘*The BANK.*’  
If it does not, use the drop-down menu to select ‘*The BANK.*’
5. For the *Logo*, make sure that ‘The BANK Logo20’ is selected.
6. For *Presenter*, make sure that this reads ‘Metavante Banking Solutions Educational Services.’
7. When all settings are as desired, click the **Publish** button.

This will begin the publishing process. Depending on the computer in use, this may take five to ten minutes.

## Bankway Awareness

### Definition

A web conference is an informational session that we present to introduce features and functions of Bankway to our customers. They are mostly a passive learning experience for the viewers. They watch and we “speak”. The content of the sessions are pre-recorded movies. The introduction, quizzes, and closing are us speaking live. The only real participation comes in the form of short quizzes during the session. The sessions last about 40-45 minutes, including our opening, the content, and the closing. Many customers have requested more in-depth presentations. For this to be successful, and it can, we need to target very narrow topics. To build our library, we have gone broad and high-level. We do not offer a true QA session. We take questions and pass them on to Client Care. They answer them for us over the next few days and we send out a mass e-mail to attendees with the answers. It seems to work well.

If customers are looking for interactive experiences with the ability to touch the software and ask questions, they are in the wrong place...we need to put them in a workshop (which, as of right now, is in development).

Consider web conferences as the lead generation system for the Strategic Account Managers, Professional Services, and other forms of Metavante education.

What we don't want is a 40-minute commercial for other education – unless that is what the session is about. If we do this, we will lose credibility and attendance will drop, as will the value scores on the sessions. The customer must feel like they got something out of their time spent and can walk away with something tangible.

### Web Conference Fundamentals

#### **Goals of Web Conferences**

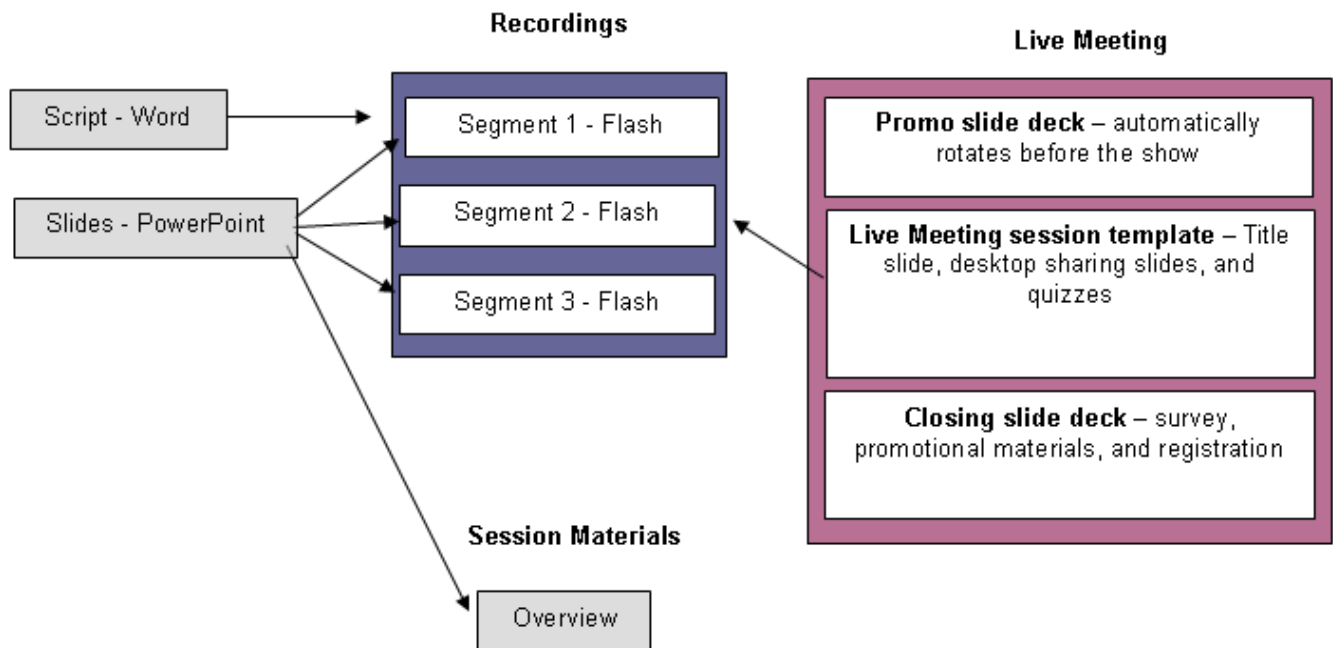
- Lower long-term call volume for Client Care
- Provide mass Metavante Bankway training to our customer base

#### **Components of a Web Conference**

A Web conference is essentially an event. As such, it has many parts. Those parts include:

- Schedule
- Marketing description
- Marketing the Session
- Script
- Quizzes
- Media – PowerPoint/Recording/Video
- Handouts – specifically the Overview & PowerPoint.

### How It All Fits Together



## Schedule

### Setting the Schedule

You cannot market a session if it is not on the schedule. People need to be able to register.

Once we decide on a topic, we can determine when it will run on the schedule. We attempt to offer every session at least three times in a given month. We are going to shoot for three times on one day (11:00 AM, 2:00 PM, and 4:00 PM). Right now, we are using the 11:00 AM and 4:00 PM slots.

We will not schedule a session unless it has these items:

- Full title
- Objectives
- Overview paragraph or two with target audience.

### Scheduling the Session

Client Events is responsible for monitoring the majority of the web conference traffic. If another division wants to run a web conference, they will probably call us.

The schedule is created in two places:

- On the Intercall Registration site – this is where you will build your event. This includes the confirmation and required e-mails.
- On the Web conference calendar in Outlook – allows you to block the time from others who might be registering sessions at the same time as you. Client Events is responsible for managing this.

In the **outlook calendar**, schedule sessions for longer than they are planned. For example, if you are running a session from 2:00 PM to 3:00 PM, schedule it from 1:30 PM to 3:30 PM. This allows you to set up time and Q&A time on the end if needed.

**SCHEDULE YOUR SESSIONS ON WEDNESDAYS AND THURSDAY.** Many banks are closed or only open for a half-day on Wednesday. Mondays and Fridays tend to stay open and Tuesday is generally for KRS web conferences. Network Sales has a set of web conferences that we facilitate for them. They try to do these on Tuesdays and Wednesdays at 11:00. If possible, do not schedule sessions on the beginning or the end of the month, quarter, or year.

Make sure one of your scheduled times is 11:00 AM to 12:00 PM. This allows the banks on the west coast to have the best access time.

**DO NOT SCHEDULE A 1:00 PM SESSION** – This is lunchtime in the Midwest.

### ***Development Schedule***

We have determined that there is approximately a standard amount of time required to develop a new session. This timeline allows us to develop 2-3 new sessions per month. “Days” are business days, not total days.

- Topic Kickoff - approximately 25 days out from the air date
- Session description – approximately 17 days from air date
- Promotion – approximately 15 days from air date
- Write Script – Starts 16 days from air date
- Deliver script for review – 11 days before air date
- Receive script with edits – 9 days before air
- Finish making edits – 6 days before air
- Start recording – 5 days before air
- Finish and Overview – 3 days before air date
- Finish recording – 2 days before air date
- Review and final corrections – 1 day before air date

### ***Topic Kickoff Meetings***

These are meetings we lead, several weeks before the topic will actually run on the schedule. The purpose of these meetings is to put all divisions that have knowledge about the topic together for an hour for us to glean information from them.

Information we expect to get from them includes:

- What are the important concepts of this topic?
- Is there a necessary order for presentation?
- What can we expect them to come away from the session with, in the way of knowledge?
- Who is the target audience for this topic?
- Is there any supporting documentation we can give them?
- Is there any information in Headquarters for them?
- What is the skill level of the topic information?
- Is there a workshop or other form of training that is related to this topic?

- Who is our Subject Matter Expert (SME) for this topic?
- Providing an expected production schedule

Once you have this information, it should be fairly easy to write a description and outline for the session.

The divisions you can expect to invite to your meeting are:

- Client Care – Ryan Dodge
- Client Services – Meredith Gessart
- SAMs – Marcy Workhum
- Implementations – Terra Norris, Warren Gordon, Jill Brown, or Shelly Stanley, Marni Riensel
- Project Management - Peter Connors, Dave Steffens, etc.
- Headquarters – Deb Kohan
- Internal Education – Dale Hardaway, Betty Rusnek
- Special Projects – Eva Hurst
- Regulatory Services – Kim Welch

Don't expect all will come, or they will be the ones that actually show. They have been told to send the appropriate representative. That is what is important.

### **Registrations**

Any of our banks can register through our Web site for any scheduled session at any time. However, we do have exceptions to this. Here are the guidelines for the exceptions:

- If a bank calls directly, we will register them without question. We will then direct them to the Web site and explain the registration process, so they can do it for themselves next time.
- If a bank or a Strategic Account Manager wants us to run a special one-off session due to a particular situation, our policy is that we do not do this. However, there are exceptions. Because of this, requests need to go through management or the appointed person in charge. If we decide to offer the one-off, we will open the session to any bank that wants to participate so we can take full advantage of the situation.
- If we, Client Events, create a problem that results in a generally negative session, we will rerun the session and determine the schedule.
- If a bank is a new conversion, and thus we do not have their e-mail information, we cannot effectively market to them. However, they act as any other client would in regards to registration. To register any client, we need a real e-mail address.
- As Client Events, we do not run one-offs sessions because another division did not perform as they were expected – registering a client, for example.

Our registration site is: [http://registration.intercall.com/menu.php?short\\_name=bankway](http://registration.intercall.com/menu.php?short_name=bankway)

Metavante has a total of 100 seats at any given time. We pay quarterly for these seats, so it is not based on the session. As a general rule, we always offer five seats to sales. This means that the maximum allowable attendance is 95. If sales need more than five seats, it is up to them to notify us. Beware: We are getting popular enough for this situation to happen...we have a popular session that has 90+

registrants (plus presenter, Assistance, and Internal Viewing), 2 SAMS need to run demos at the same time to two different banks (each taking three seats) and then you get a call to increase the demo. Yes, each SAM is using less than five, but they total six and want another seat, making seven. Your total is  $93+7$  or 100. You have capped out.

To be fair in the above example, we usually have about one-third of the registrants not show up for Client Events' sessions because they are free. This may not always be the case and KRS has a stronger attendance ratio. This is where it becomes an issue.

### **Writing the Marketing Description**

You need a paragraph or two describing the course so people will want to attend it. You also need to define a target audience and a skill level. Here is the description example from Credit Facilities.

Credit Facilities are a powerful tool within Metavante Bankway that allows you to monitor your bank's commitments to lend. They also allow you to identify the maximum you are willing to lend a client. On the surface, this feature may seem complex and more than necessary for your average clients. Find out how to expand common lending activities, such as Letters of Credit and Dealer Floorplanning so your bank can easily manage them.

- Target: End-users or Metavante Bankway who open Personal and/or Business Loans and their Management
- Skill Level: Intermediate

This description goes on the master schedule and on the Intercall Event Registration page as the description. We also use it to promote internally.

### **Getting the E-Mail Addresses**

This is the verbiage for a peer group-level e-mail.

Good morning. We would like to take this opportunity to update you on an upcoming Web conference; Customizing Your Bank's Credit Risk Classifications on March 31 at 2:00 PM EST. This one-hour, value-based, interactive session is free of charge.

(DESCRIPTION HERE)

To register for this or any other Metavante Bankway Web conference, please click the following link:

[www.Metavante.com](http://www.Metavante.com)

Instructions:

- Place a check mark next to the Web conference you wish to attend.
- Click Register.
- When prompted, enter your name (first and last), last name, e-mail address, and bank/data center name.
- Click Submit.
- You will immediately receive an e-mail with further instructions.
- If you have any questions, please contact [education@Metavante.com](mailto:education@Metavante.com)
- Please see the supplementary instructions on how to send this e-mail.
- Make sure to use "Metavante Web Conferences" in the subject.

### **Putting the Session on the Web for Registration**

You must have the session description to perform this procedure.

Intercall's registration site is:

<http://registration.intercall.com/admin/index.php>

- Login: client
- Password: events

### **Build the Event**

1. Determine if the session is a new session or a rerun of an existing session.
  - **New** – Duplicate last session on list and make the necessary changes. Your build of this event will not have an Overview or Slides because they have yet to be created.
  - **Rerun** – Find a previous version of this session in the event list and duplicate that event. Change the date, times, and Meeting ID
2. On Intercall's registration site, perform the appropriate action from Step 1. You should now have an event you are modifying. Change the dates and times.

### **Get the Meeting Link**

3. Log into Live Meeting's web site and schedule a new meeting.
4. Give the meeting a name. This is NOT the Meeting ID.  
This name needs to be readable and understandable.
5. Set the date and time
6. Modify the meeting
7. Give the meeting a Meeting ID. This should be all lowercase. Do not use 1's or 0's if possible.  
Use the format xxxa, xxxb, and xxxc for multiple sessions of the same topic.
8. Save this meeting. You are presented with an Attendee URL. Copy this URL.

### **Add Meeting Information to the Event**

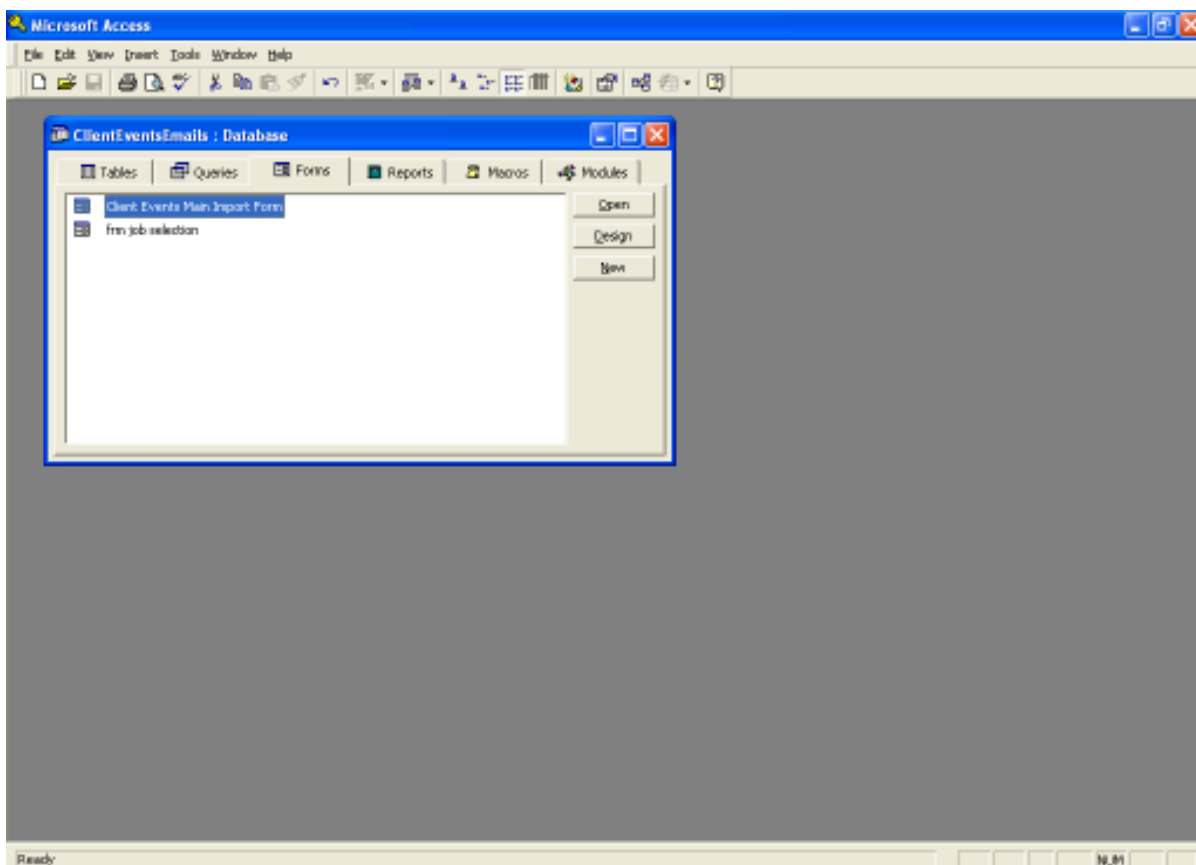
9. In Intercall, find the links from the original event. Paste the new links over the existing events. This occurs three times in the event:
  - **Confirmation Screen** – The screen customers see after they register
  - **Confirmation E-mail** – The e-mail customers receive confirming their registration
  - **Reminder E-mail** – The e-mail the customers receive a day before the session occurs
10. In the Reminder E-mail, copy the Meeting ID and Paste it in the Meeting ID location in the e-mail.
11. Make sure the Title is correct. Add a "-" at the end. This is due to the way Intercall formats their e-mails. If the session is a new one, place "- NEW! -" at the end. If you duplicated a session for rerun purposes, check this Title field! You may have duplicated the original, new session.
12. Add the Meeting Title in the introductory line on the Confirmation screen and the Reminder e-mail. The Confirmation e-mail is generic.

13. If this is a new session, remove any references to documents for download. THEY ARE WRONG! If this is a rerun, leave the references.
14. Confirm that the conference call phone numbers are the same.
15. Save the event. Access the registration page and check for accuracy.

## Developing the Mass E-mail Campaign

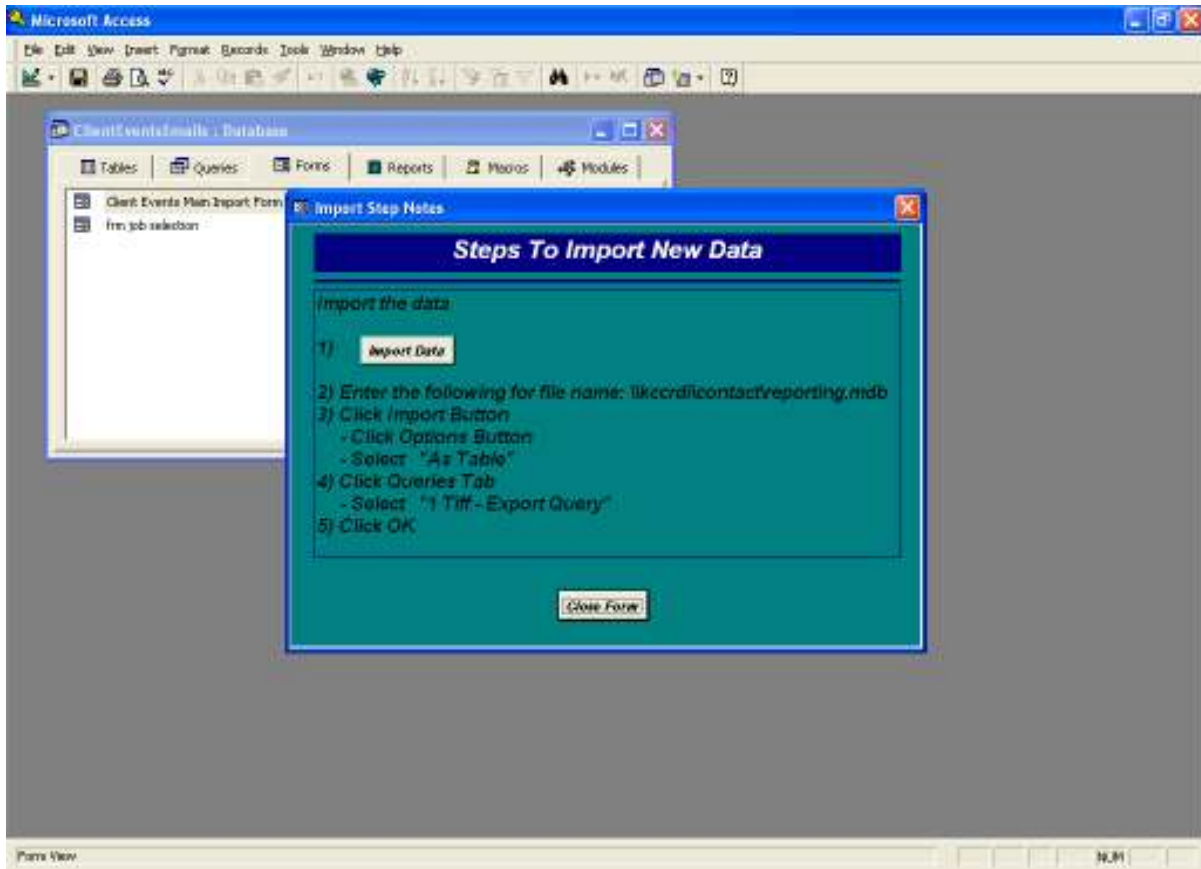
### Creating the Actual Campaign

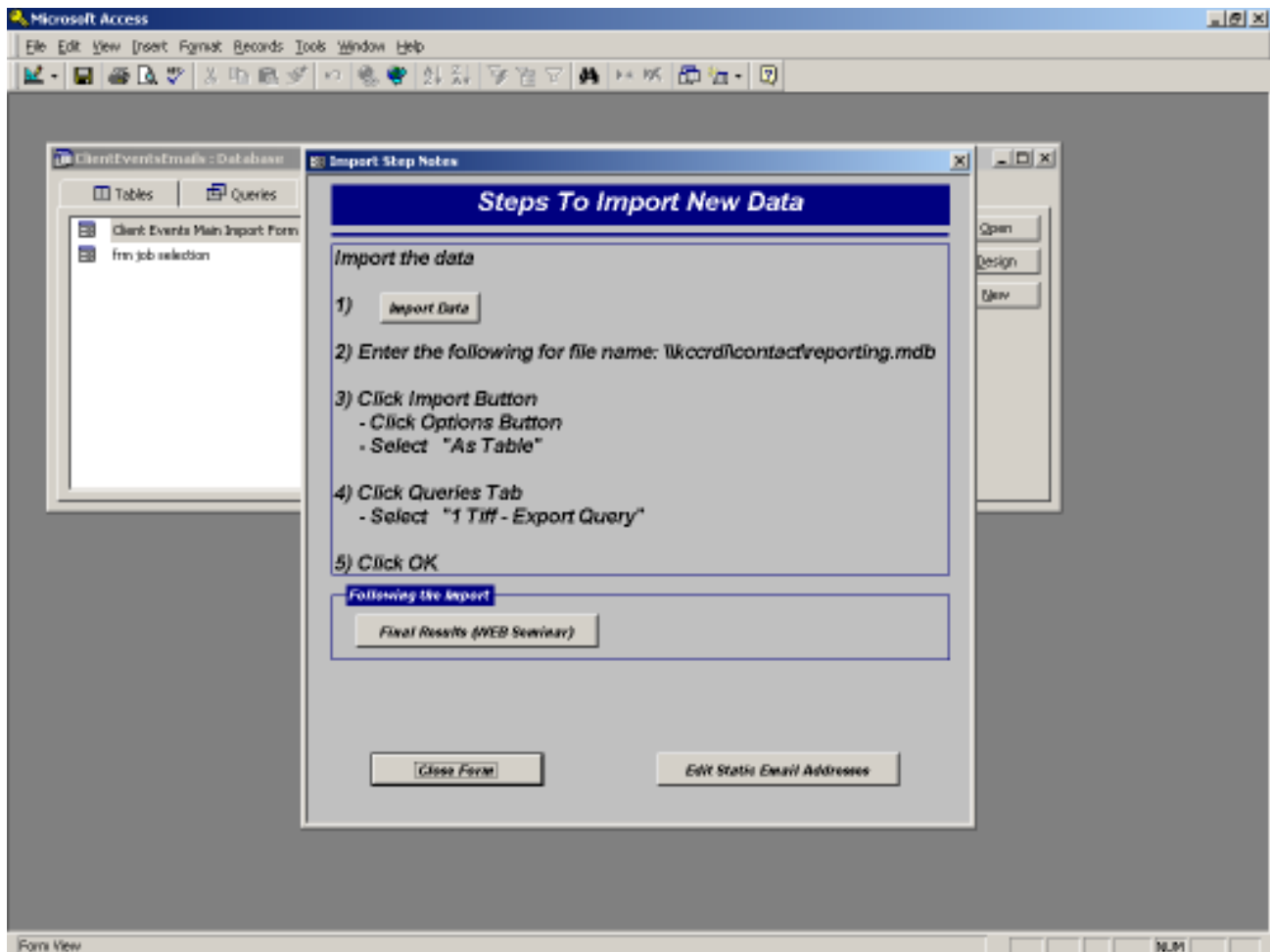
1. Go to [\\Distribution\EMAIL](#).
2. Open ClientEventsEmails.mdb



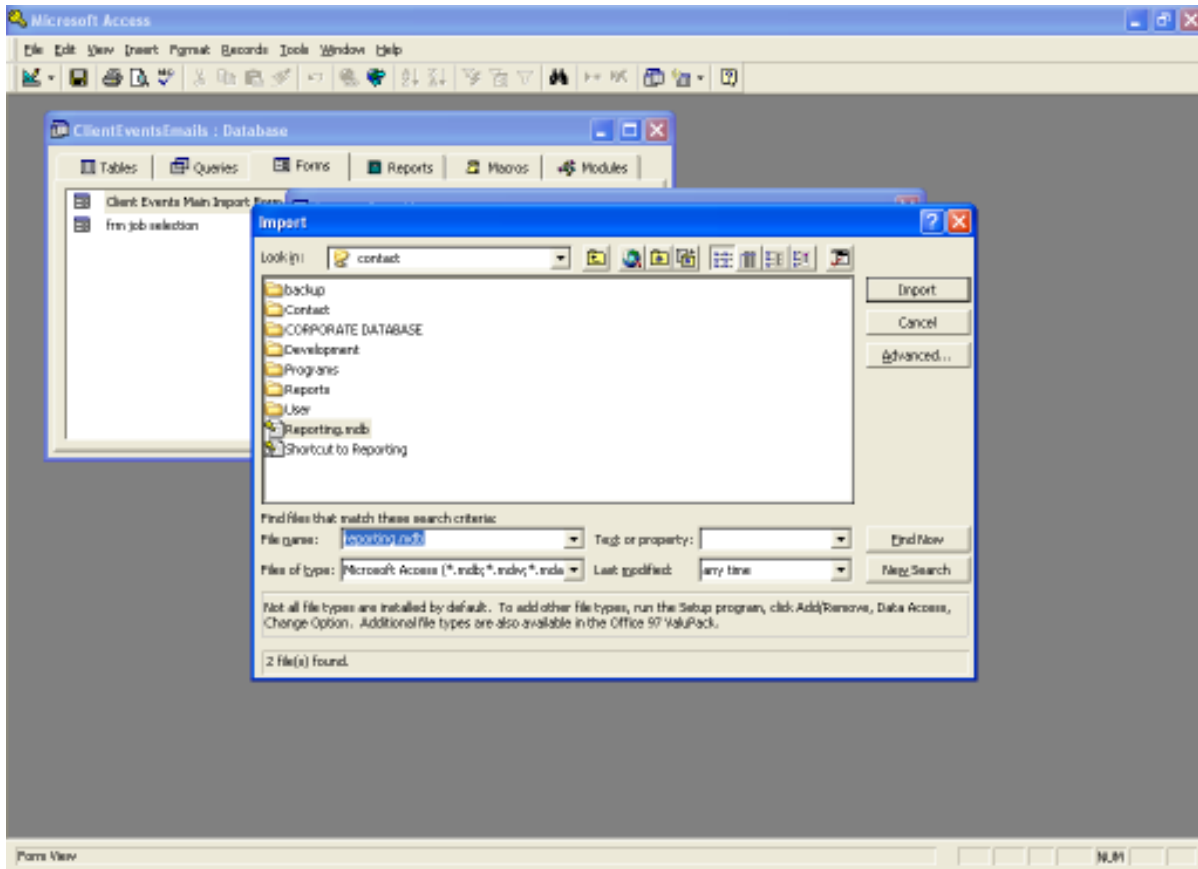
3. Go to the Forms tab.
4. Highlight "Client Events Main Import Form" and click OPEN.



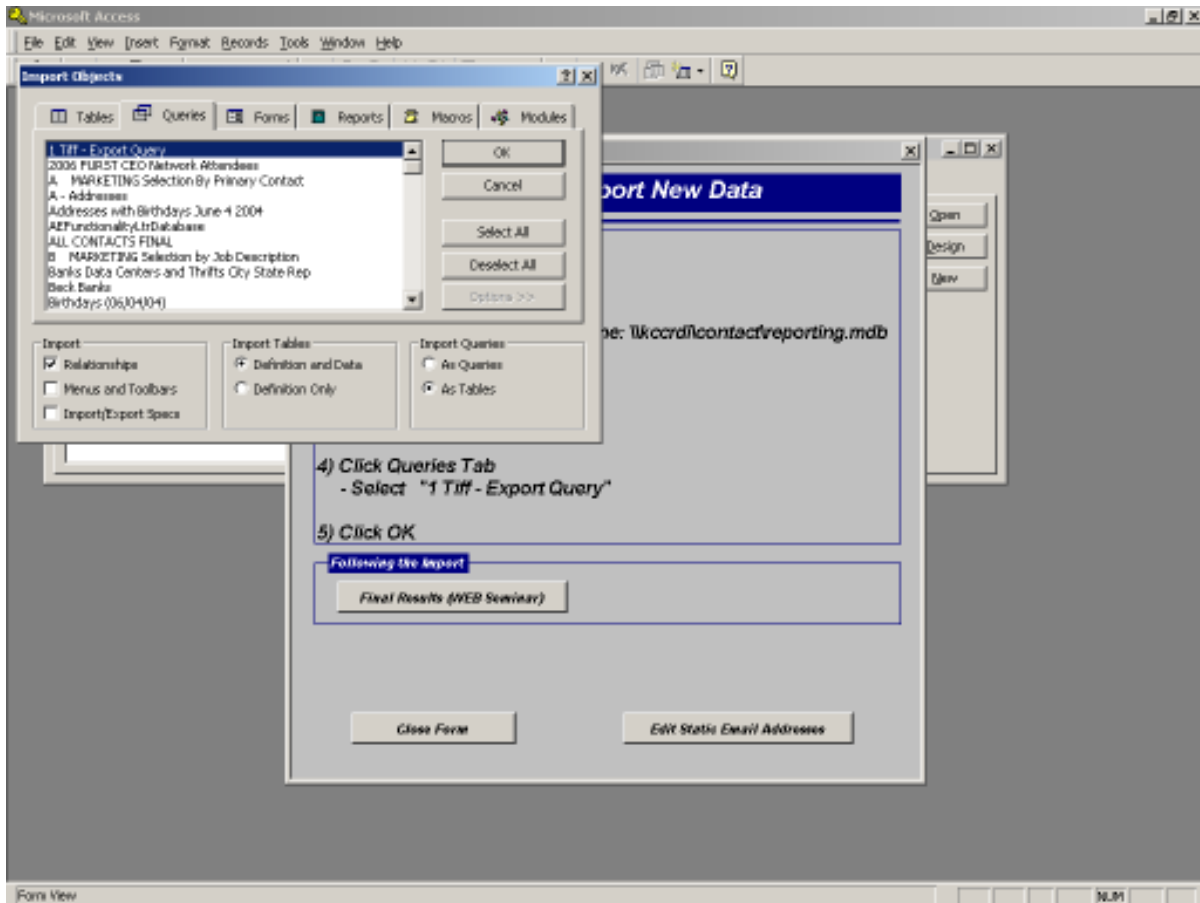




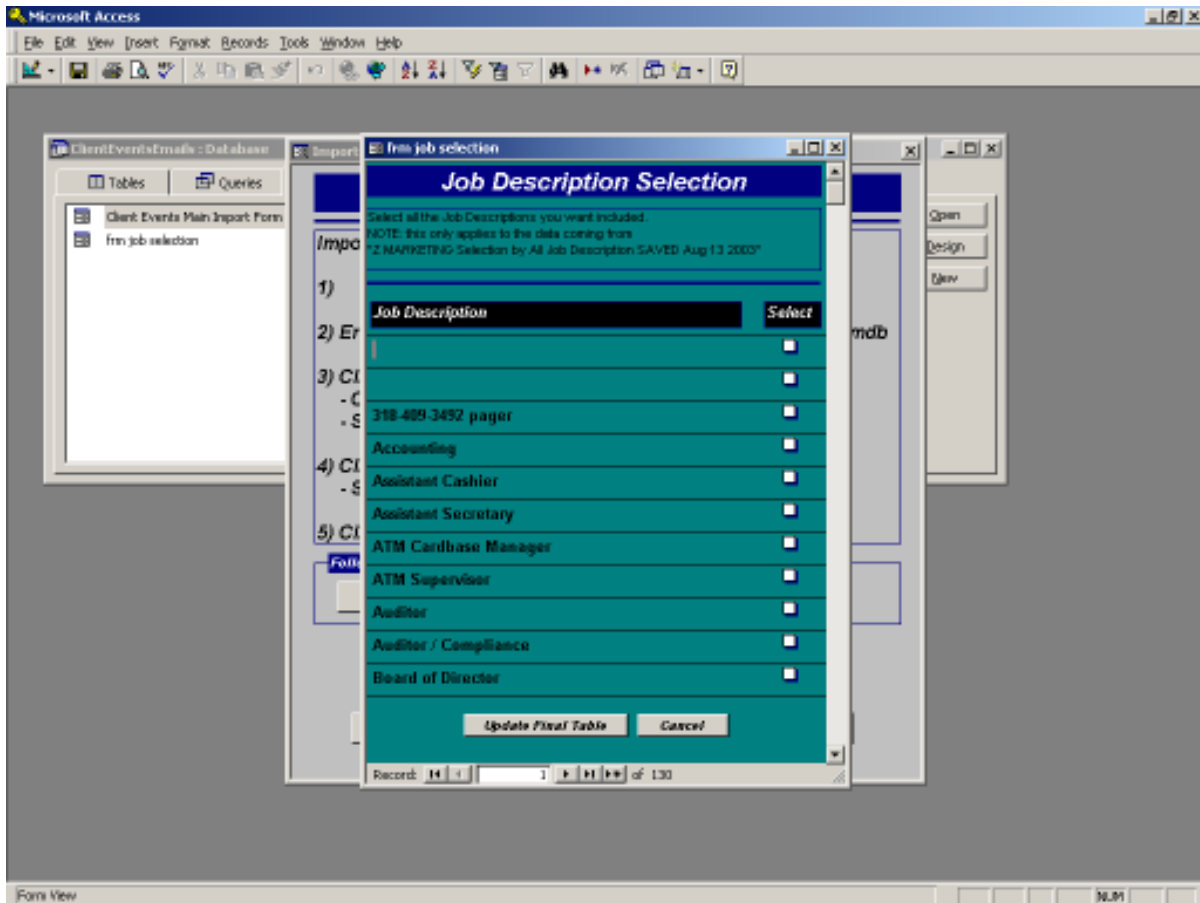
5. Click IMPORT DATA.
6. Enter the following for file name:
  - <\\kccrdi\contact\reporting.mdb>



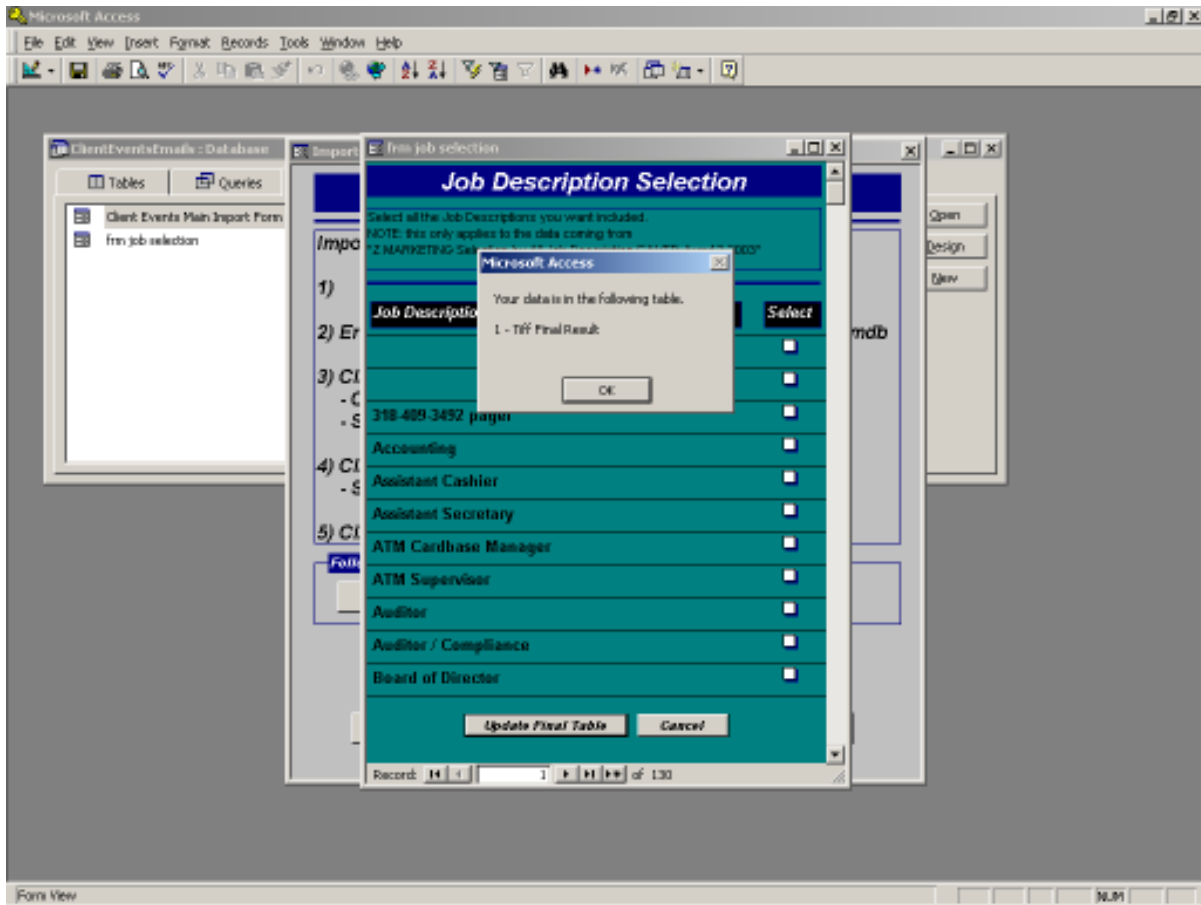
7. Click IMPORT button.



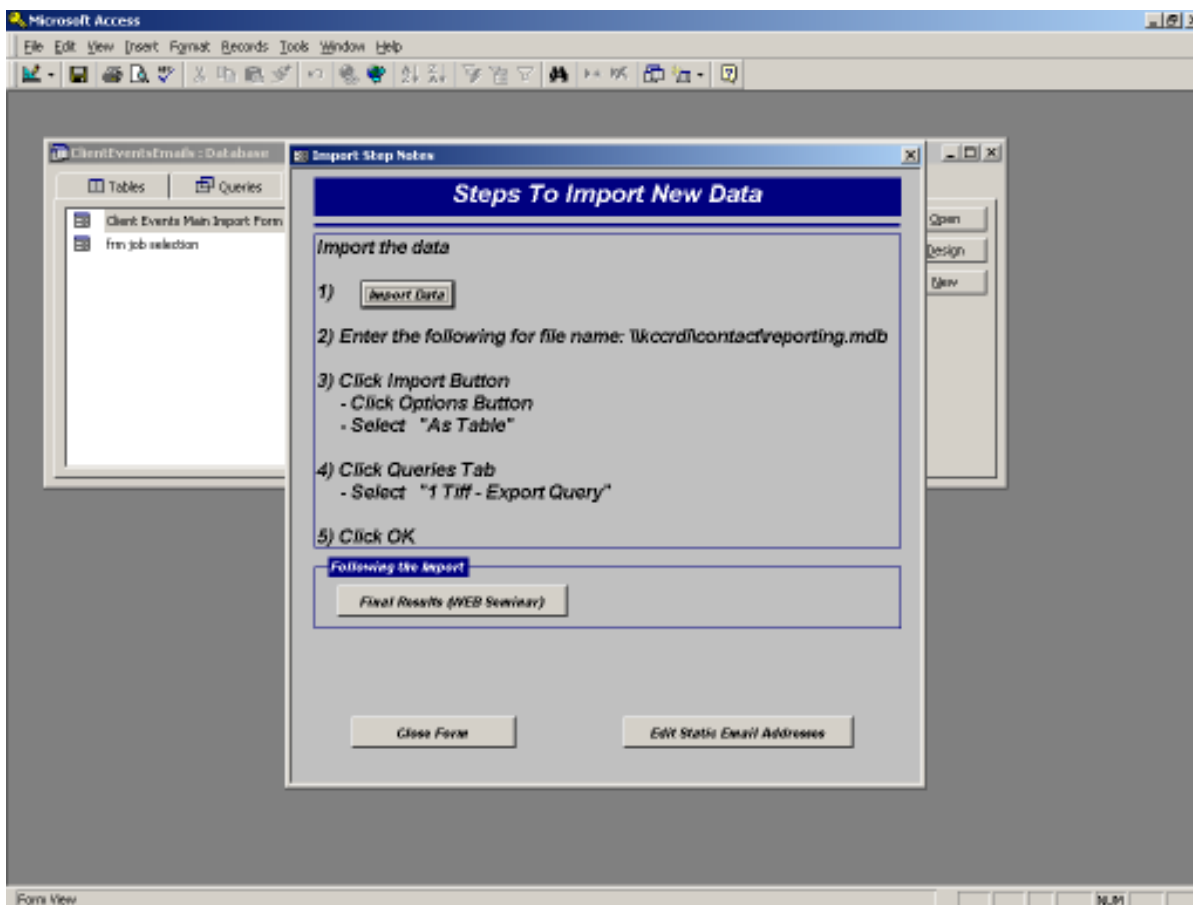
- Click OPTIONS button
  - Select “As Table”
8. Click QUERIES tab.
    - Select “1 Tiff – Export Query”
  9. Click OK.



10. Place check marks next to each job description you wish to send an email to.
11. Once completed, click UPDATE FINAL TABLE.
12. The “base” query automatically pulls the primary contact and education/sales contact for each customer.



13. Click OK.



At this point, you have a list of ALL customers that meet your requirements. This list includes:

- Duplicate records (Technically, the education and primary contacts are two records, even though they have the same e-mail address).
- Foreign banks that match your criteria
- Possibly a de-converted bank or two of which you are not aware.

For the mass e-mails that we send out to promote web conferences, R&D added an enhancement in early January for us. This enhancement to our form creates a NEW, secondary table for you. This new table filters out duplicate e-mails, foreign banks (outside of the Bahamas and Puerto Rico), and de-converted banks. It has once column of data in it – e-mail address.

Regarding the filter, here are some of the rules we used:

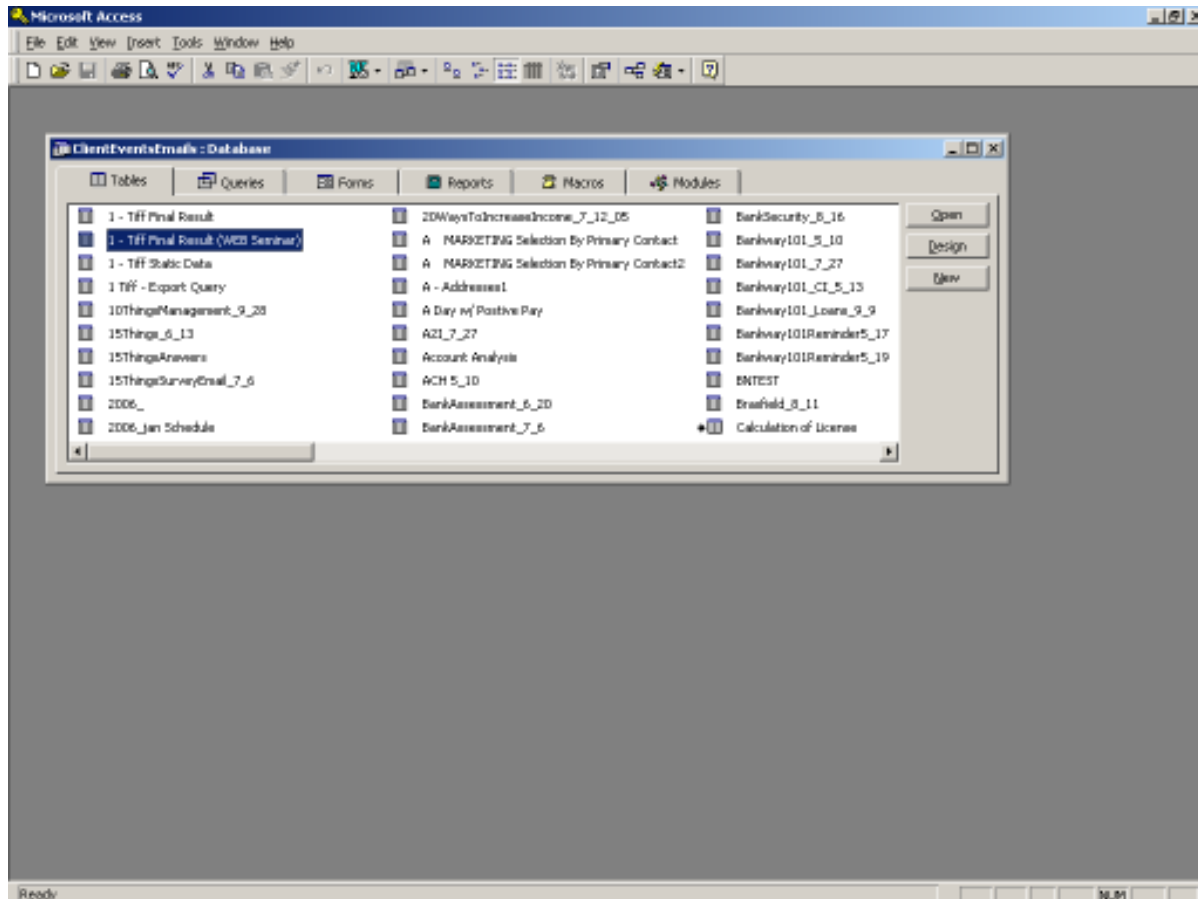
- **Domestic Customer** = value in the State field OR both City AND State are empty
- **Active Banks** = values of C, D, H, and T

14. To create this secondary form, Click Final Results (WEB Seminar). The table is called “1 – Tiff Final Result (WEB Seminar)” and you can find it on the Table tab.

15. Rename this file and you are ready to use it.

Another enhancement we are working with is the ability to add e-mail addresses to our list on demand. There is a table called Static E-mail Addresses for this purpose. If you click the button of the same name, you will be able to add any new e-mail address to the list. This query is supposed to incorporate this E-mail address table into its final result. Before you use the table, we recommend you check that it did add these e-mail addresses as you expected.

16. When you are done, click CLOSE FORM.

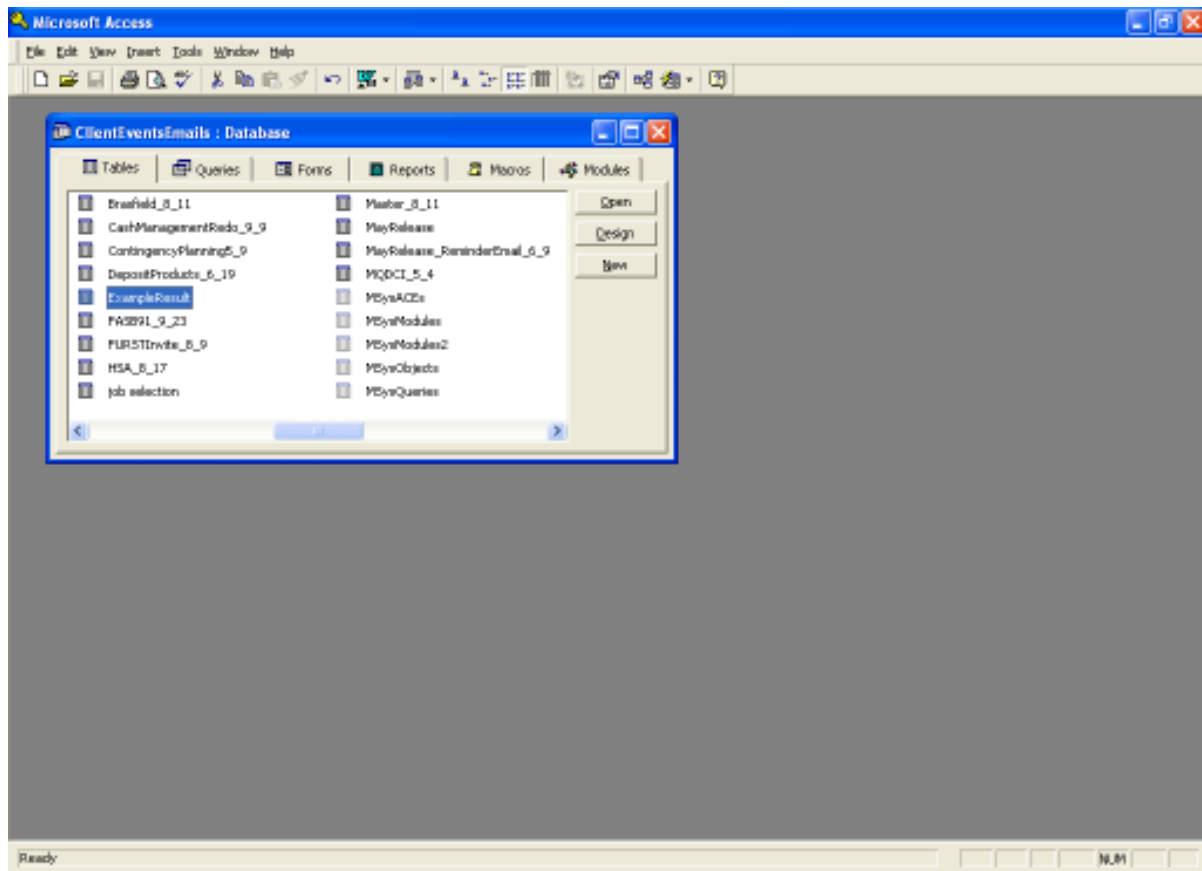


17. Click the TABLES tab.

18. Rename “1 – Tiff Final Result” (This is your full query) to “SessionTitle\_Date”

Use the filtered table, “1 – Tiff Final Result (WEB Seminar)”, unless you have a specific need for the full, unfiltered query results. This will save you lots of time!





19. Highlight the name of the query you just created and click OPEN.

## Unfiltered Results

Email Address	Source	Selection	Job Description	Job Description	Full Name	Company Name	Region Name
jeff@bank.com	Education Cent	President			Jeffery W. Wolf	First National Bank	Georgia, GA
jeff@bank.com	Marketing Firm				NOA	The Home Depot	Ill, Ill
jeff@bank.com	Education Cent	Senior Operator	President		Jeffery W. Wolf	Bank of America	Ill, Ill
jeff@bank.com	Education Cent	Chief Operating			Greg J. Wick	First Bank & Tr	Ill, Ill
jeff@bank.com	Education Cent	Branch Manager			Aden C. Hahn	American Cent	Ill, Ill
jeff@bank.com	Education Cent	Data Processor			Michael J. Hill	Capital B. Nk	Ill, Ill
jeff@bank.com	Marketing Firm	Data Processor			NOA	Capital B. Nk	Ill, Ill
jeff@bank.com	Education Cent	Compliance			Jeffery W. Wolf	First National B. Nk	Ill, Ill
jeff@bank.com	Education Cent	Chief Financial			Jeffery W. Wolf	First State Bank	Ill, Ill
jeff@bank.com	Marketing Firm	Chief Financial			NOA	First State Bank	Ill, Ill
jeff@bank.com	Marketing Firm	President			NOA	Bank of America	Ill, Ill
jeff@bank.com	Marketing Firm	Data Processor			NOA	Bank of America	Ill, Ill
jeff@bank.com	Education Cent	Data Processor	Senior Operator		Jeffery W. Wolf	Traditional Bank	Ill, Ill
jeff@bank.com	Marketing Firm	Chief Operating			NOA	Traditional Bank	Ill, Ill
jeff@bank.com	Marketing Firm	Chief Operating			NOA	Traditional Bank	Ill, Ill
jeff@bank.com	Marketing Firm	Data Processor			NOA	Central State B. Nk	Ill, Ill
jeff@bank.com	Marketing Firm	Other Operator			NOA	First National B. Nk	Ill, Ill
jeff@bank.com	Education Cent	Chief Information			Theodore G. Fier	Central Bank & Nk	Ill, Ill
jeff@bank.com	Marketing Firm	Chief Information			NOA	Central Bank & Nk	Ill, Ill
jeff@bank.com	Education Cent	Chief Executive	President	Retail Product	Jeffery W. Wolf	First State Fin. Nk	Ill, Ill
jeff@bank.com	Marketing Firm	Senior Operator			NOA	Bank of America	Ill, Ill
jeff@bank.com	Education Cent	Information Tech			Jessica M. Fie	First National B. Nk	Ill, Ill
jeff@bank.com	Marketing Firm	Data Processor			NOA	Bay Bank & Tr	Ill, Ill
jeff@bank.com	Education Cent	Other Data Proc.	Compliance		Scott J. Wick	Bank of the So. Nk	Ill, Ill
jeff@bank.com	Marketing Firm	Chief Financial			NOA	Central Bank & Nk	Ill, Ill
jeff@bank.com	Education Cent	Chief Information			NOA	First Guaranty B. Nk	Ill, Ill
jeff@bank.com	Education Cent	Other Technical			Scott J. Wick	Bank Systems	Ill, Ill
jeff@bank.com	Marketing Firm	Chief Operating			NOA	South First Bank	Ill, Ill
jeff@bank.com	Marketing Firm	Chief			NOA	Trust City Bank	Ill, Ill
jeff@bank.com	Education Cent	Senior Lending Operations	Dir.		Patricia S. Spurr	First State Bank	Ill, Ill

## Filtered results

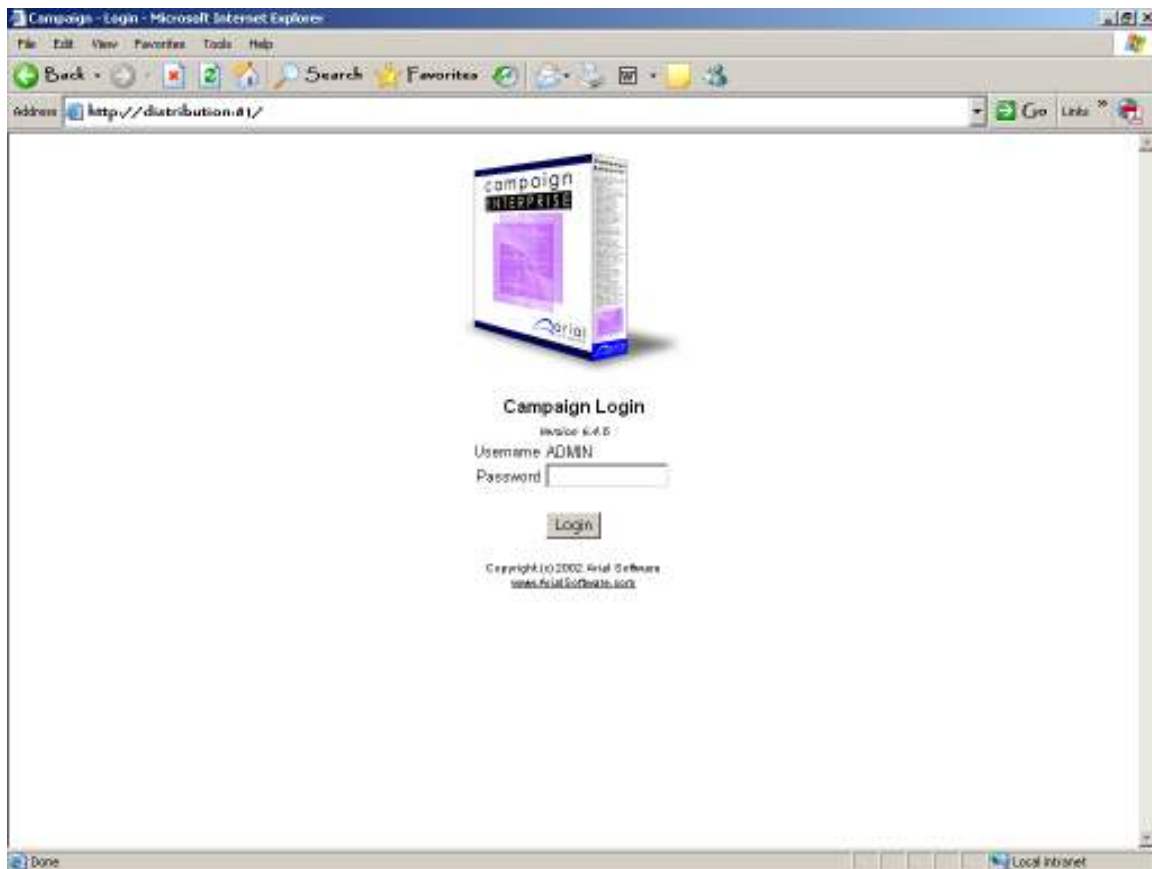
Email Address	Source	Selection	Job Description	Job Description	Full Name	Company Name	Region Name
jeff@bank.com	Education Cent	President			Jeffery W. Wolf	First National Bank	Georgia, GA
jeff@bank.com	Marketing Firm				NOA	The Home Depot	Ill, Ill
jeff@bank.com	Education Cent	Senior Operator	President		Jeffery W. Wolf	Bank of America	Ill, Ill
jeff@bank.com	Education Cent	Chief Operating			Greg J. Wick	First Bank & Tr	Ill, Ill
jeff@bank.com	Education Cent	Branch Manager			Aden C. Hahn	American Cent	Ill, Ill
jeff@bank.com	Education Cent	Data Processor			Michael J. Hill	Capital B. Nk	Ill, Ill
jeff@bank.com	Marketing Firm	Data Processor			NOA	Capital B. Nk	Ill, Ill
jeff@bank.com	Education Cent	Compliance			Jeffery W. Wolf	First National B. Nk	Ill, Ill
jeff@bank.com	Education Cent	Chief Financial			Jeffery W. Wolf	First State Bank	Ill, Ill
jeff@bank.com	Marketing Firm	Chief Financial			NOA	First State Bank	Ill, Ill
jeff@bank.com	Marketing Firm	President			NOA	Bank of America	Ill, Ill
jeff@bank.com	Marketing Firm	Data Processor			NOA	Bank of America	Ill, Ill
jeff@bank.com	Education Cent	Data Processor	Senior Operator		Jeffery W. Wolf	Traditional Bank	Ill, Ill
jeff@bank.com	Marketing Firm	Chief Operating			NOA	Traditional Bank	Ill, Ill
jeff@bank.com	Marketing Firm	Chief Operating			NOA	Traditional Bank	Ill, Ill
jeff@bank.com	Marketing Firm	Data Processor			NOA	Central State B. Nk	Ill, Ill
jeff@bank.com	Marketing Firm	Other Operator			NOA	First National B. Nk	Ill, Ill
jeff@bank.com	Education Cent	Chief Information			Theodore G. Fier	Central Bank & Nk	Ill, Ill
jeff@bank.com	Marketing Firm	Chief Information			NOA	Central Bank & Nk	Ill, Ill
jeff@bank.com	Education Cent	Chief Executive	President	Retail Product	Jeffery W. Wolf	First State Fin. Nk	Ill, Ill
jeff@bank.com	Marketing Firm	Senior Operator			NOA	Bank of America	Ill, Ill
jeff@bank.com	Education Cent	Information Tech			Jessica M. Fie	First National B. Nk	Ill, Ill
jeff@bank.com	Marketing Firm	Data Processor			NOA	Bay Bank & Tr	Ill, Ill
jeff@bank.com	Education Cent	Other Data Proc.	Compliance		Scott J. Wick	Bank of the So. Nk	Ill, Ill
jeff@bank.com	Marketing Firm	Chief Financial			NOA	Central Bank & Nk	Ill, Ill
jeff@bank.com	Education Cent	Chief Information			NOA	First Guaranty B. Nk	Ill, Ill
jeff@bank.com	Education Cent	Other Technical			Scott J. Wick	Bank Systems	Ill, Ill
jeff@bank.com	Marketing Firm	Chief Operating			NOA	South First Bank	Ill, Ill
jeff@bank.com	Marketing Firm	Chief			NOA	Trust City Bank	Ill, Ill
jeff@bank.com	Education Cent	Senior Lending Operations	Dir.		Patricia S. Spurr	First State Bank	Ill, Ill

20. Remove all emails for non-domestic banks. (Check under the city, state, zip field for this)
21. Remove all contacts with no emails, email addresses that state NO EMAILS, duplicate email addresses, and international e-mail addresses.
22. Then save the file.
23. Exit Access.

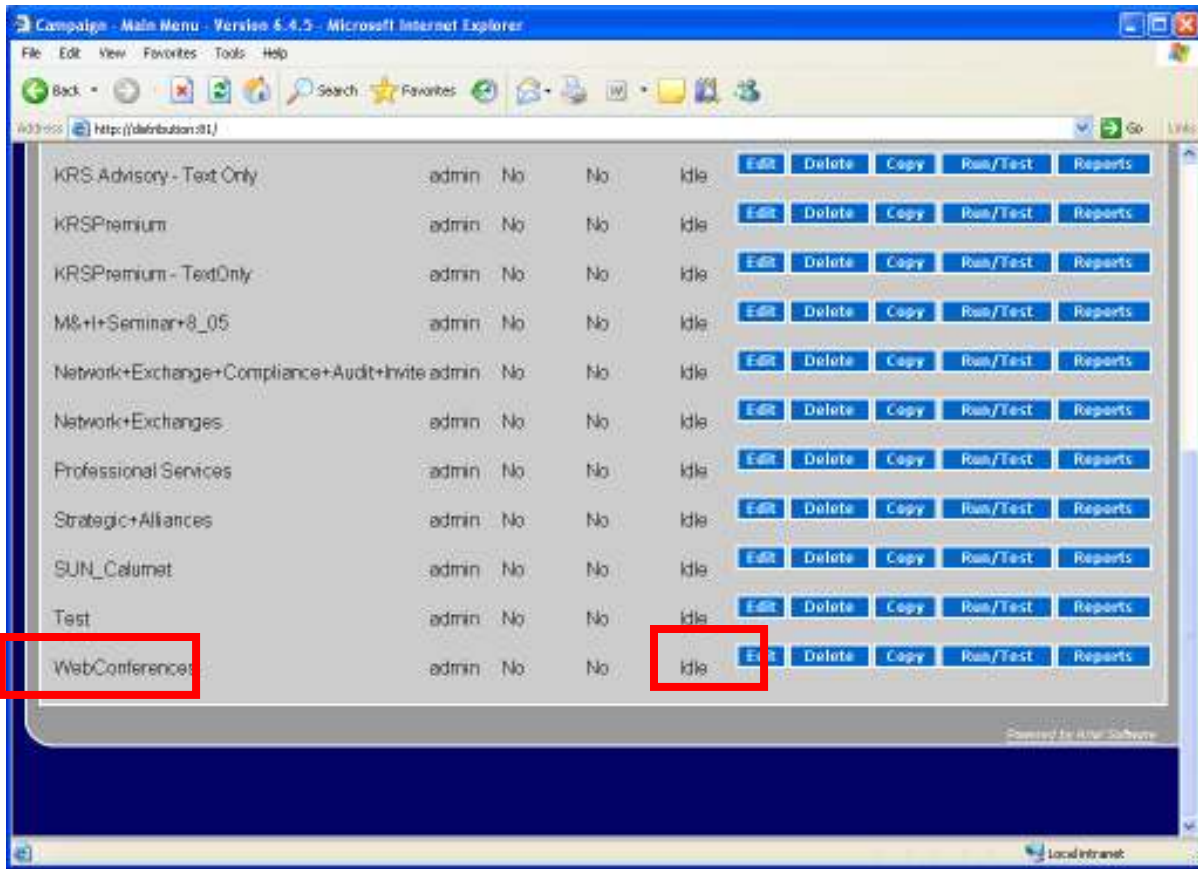
## Campaign

To access the mass email program (Campaign), go to your windows browser and copy this into it <http://distribution:81> . Once you are in the main screen, save it as a favorite.

- User: ADMIN
- Pass: lefler



1. Click LOGIN.

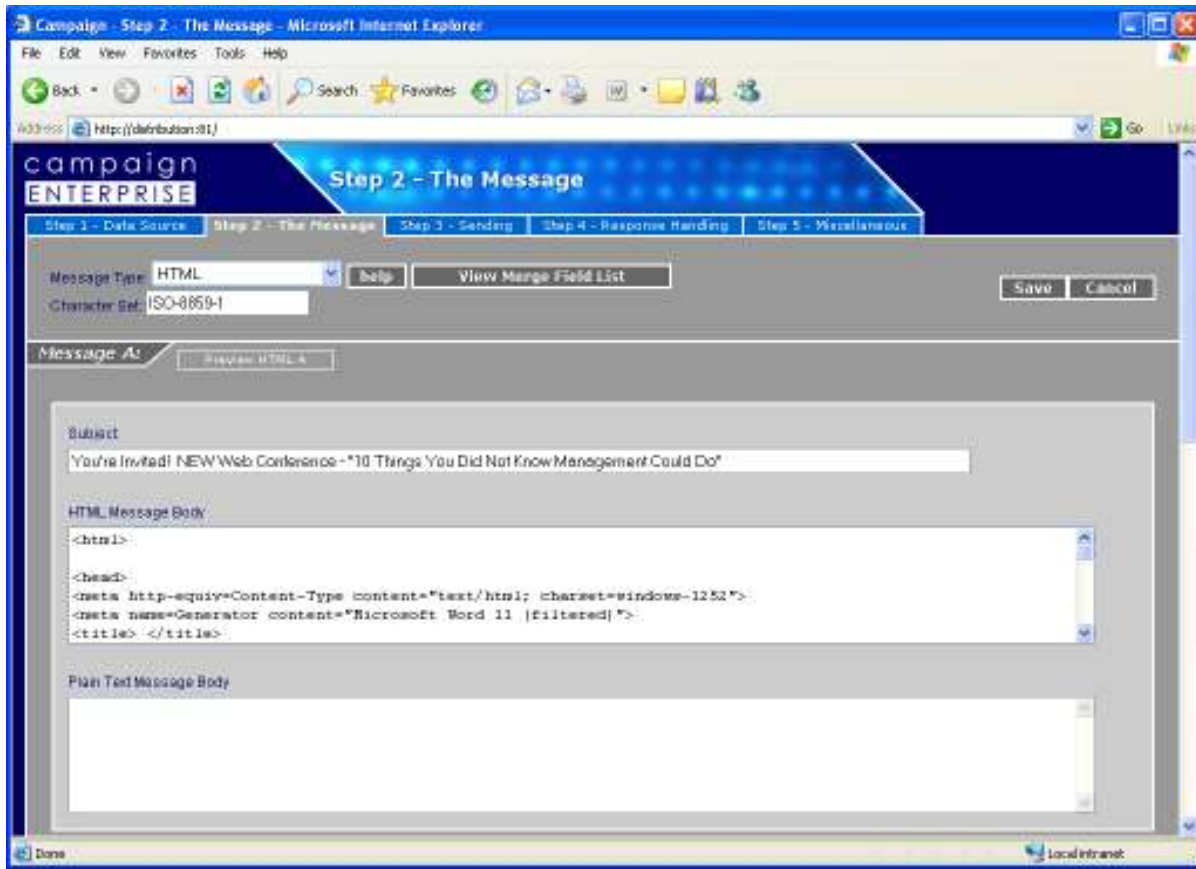


2. Scroll to the bottom and click EDIT under WebConferences

The screenshot shows the 'Campaign Enterprise' web interface in Microsoft Internet Explorer. The browser window title is 'Campaign - Step 1 - Data Source - Microsoft Internet Explorer'. The address bar shows 'http://distribution311/'. The page has a blue header with 'campaign ENTERPRISE' and 'Step 1 - Data Source'. Below the header is a navigation bar with tabs for 'Step 1 - Data Source', 'Step 2 - The Message', 'Step 3 - Sending', 'Step 4 - Response Handling', and 'Step 5 - Miscellaneous'. The main content area is titled 'Step 1 - Data Source' and contains the following fields and controls:

- Campaign Name: WebConferences (with Save and Cancel buttons)
- Database section:
  - Database Type: Microsoft Access (with help button)
  - Database Source: c:\EMAIL\ClientEventsEmails.mdb (with browse, refresh, and help buttons)
  - Table/Query Name: ExampleResult (with refresh and help buttons)
  - Email Address Field: EmailAddress (with help button)
  - CC Email Address Field: (empty)
  - Enable Advanced Filter:
- Basic Database Filters section (with help button):
  - Basic Filter: A table with columns for field selection, comparison operators, and values.

3. Do not change the Database Type, Database Source, or Email Address Field.
4. Change the Table/Query Name to the name of the query you just created.
5. If you have to refresh, make sure to have e-mail addresses.



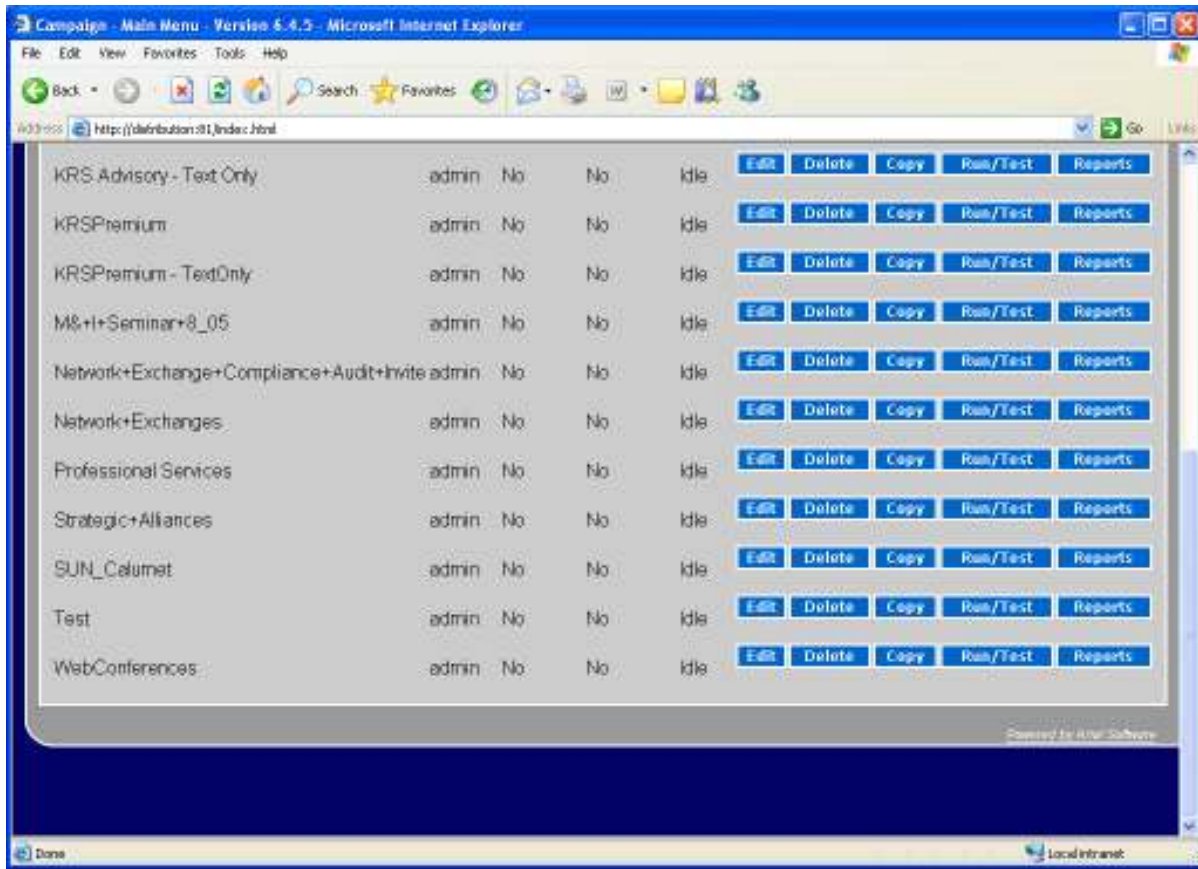
6. Click the “Step 2 – The Message” tab.
7. Change the Subject line to a new subject line according to the session you are running.

Hint: Change the *You're Invited* to *You Are Invited* every other time. Also, move NEW into other places in the subject line. This will keep the emails different.

8. Paste in the HTML Message Body, the invite. See page 18 for instructions on how to do this.

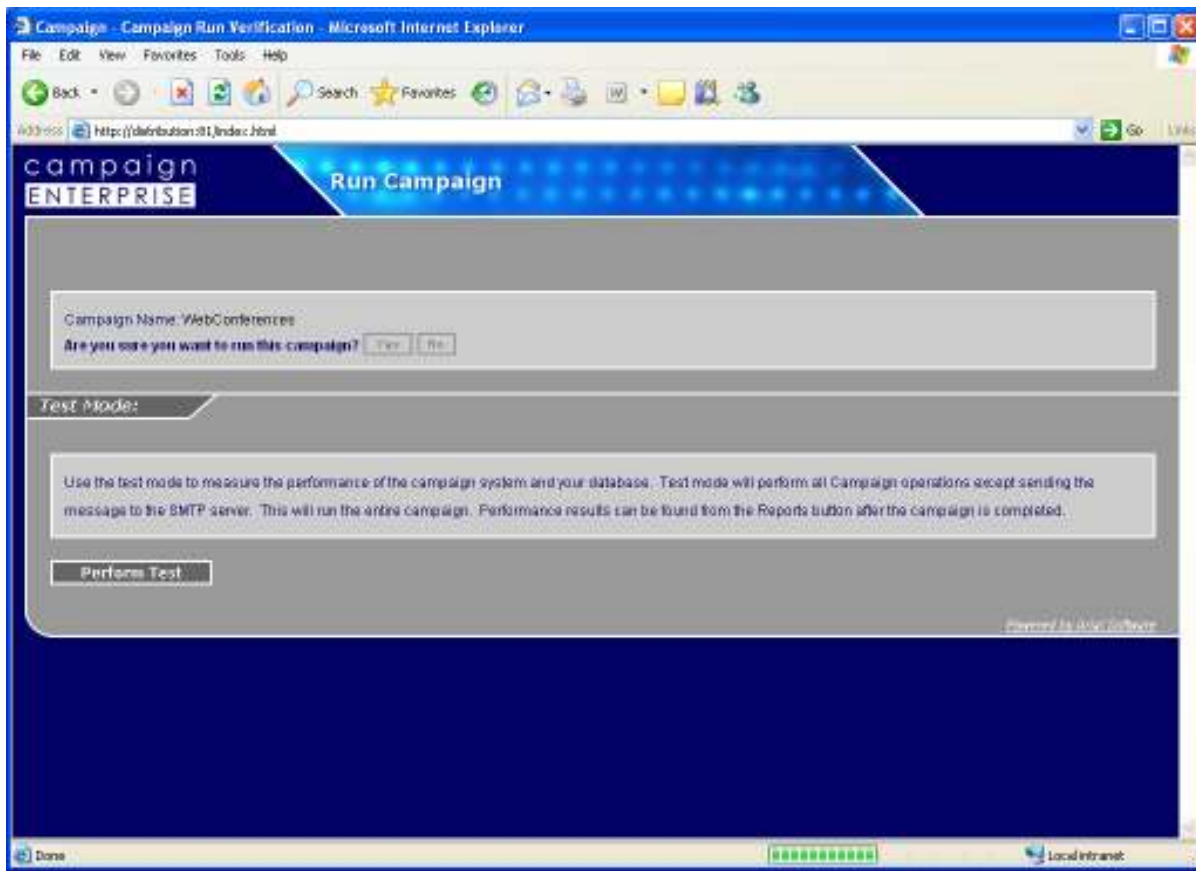
The screenshot shows the 'Campaign Enterprise' web interface in Microsoft Internet Explorer. The browser window title is 'Campaign - Step 3 - Sending - Microsoft Internet Explorer'. The address bar shows 'http://distribution01/index.html'. The page has a blue header with 'campaign ENTERPRISE' and 'Step 3 - Sending'. Below the header are navigation tabs: 'Step 1 - Data Source', 'Step 2 - The Message', 'Step 3 - Sending' (selected), 'Step 4 - Response Handling', and 'Step 5 - Miscellaneous'. There are 'Save' and 'Cancel' buttons in the top right. The main content area is divided into three sections: 'Mail Server (SMTP):', 'Header Email Addresses:', and 'Scheduling:'. Each section has a 'help' button. The 'Mail Server (SMTP):' section has a text input field for 'SMTP Server Hostname or IP address' with the value '12.110.176.100' and an example: '192.168.24.10 or smtp.usgatoiraks.com'. The 'Header Email Addresses:' section has four text input fields: 'Email address example: name@domain.com', 'From (required): education@kirchman.com', 'Return Path (required): bdnadler@kirchman.com', and 'Reply-To: bdnadler@kirchman.com'. The 'Scheduling:' section has a checkbox for 'Enable Schedule' which is unchecked, and a text input field for 'Send next at' with the value '12:00 AM' on '09/24/2005' and a dropdown for 'and repeat every' with the value '0' and a unit of 'Day(s)'. A note says '(enter 0 to run only once and then disable schedule)'. The status bar at the bottom shows 'Done' and 'Local intranet'.

9. Click the “Step 3 – Sending” tab.
10. Verify the correct email addresses are under the Header Email Addresses fields.
11. Click SAVE.



12. Click RUN/TEST.



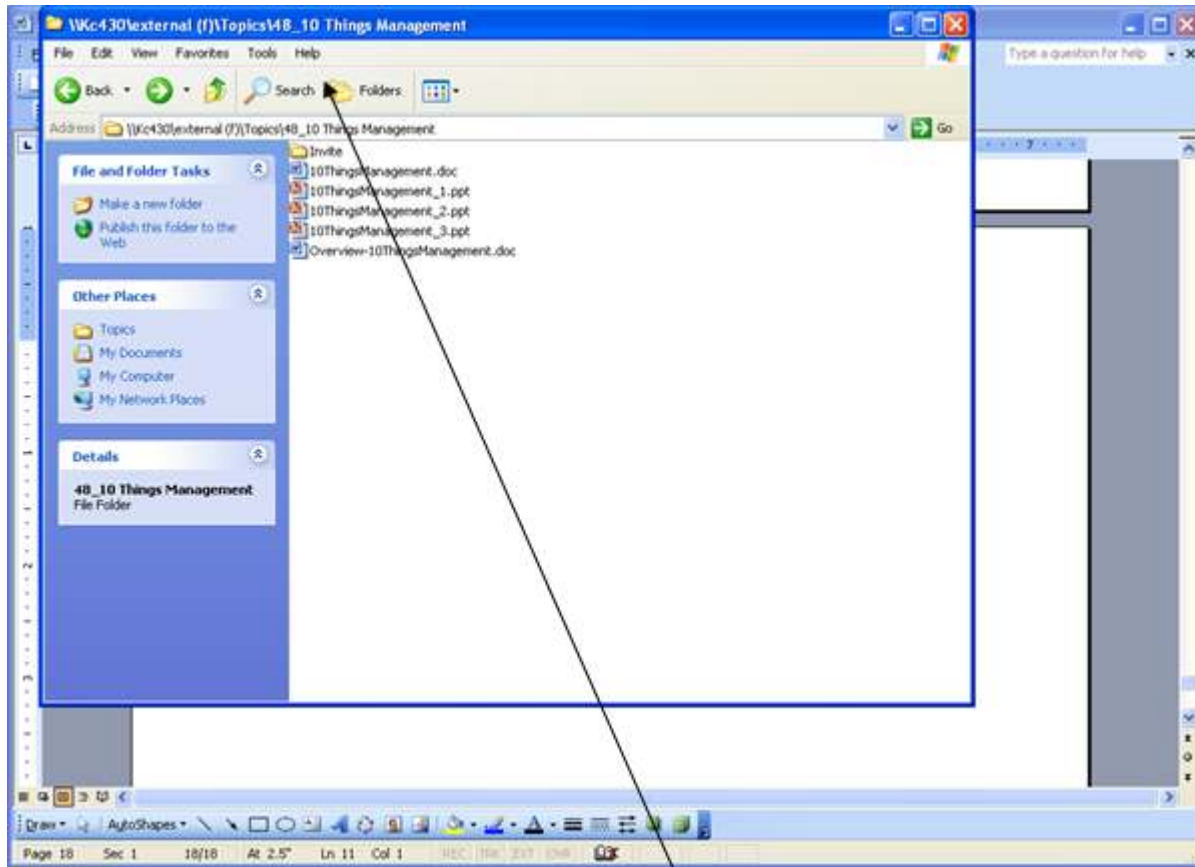


13. Click YES.

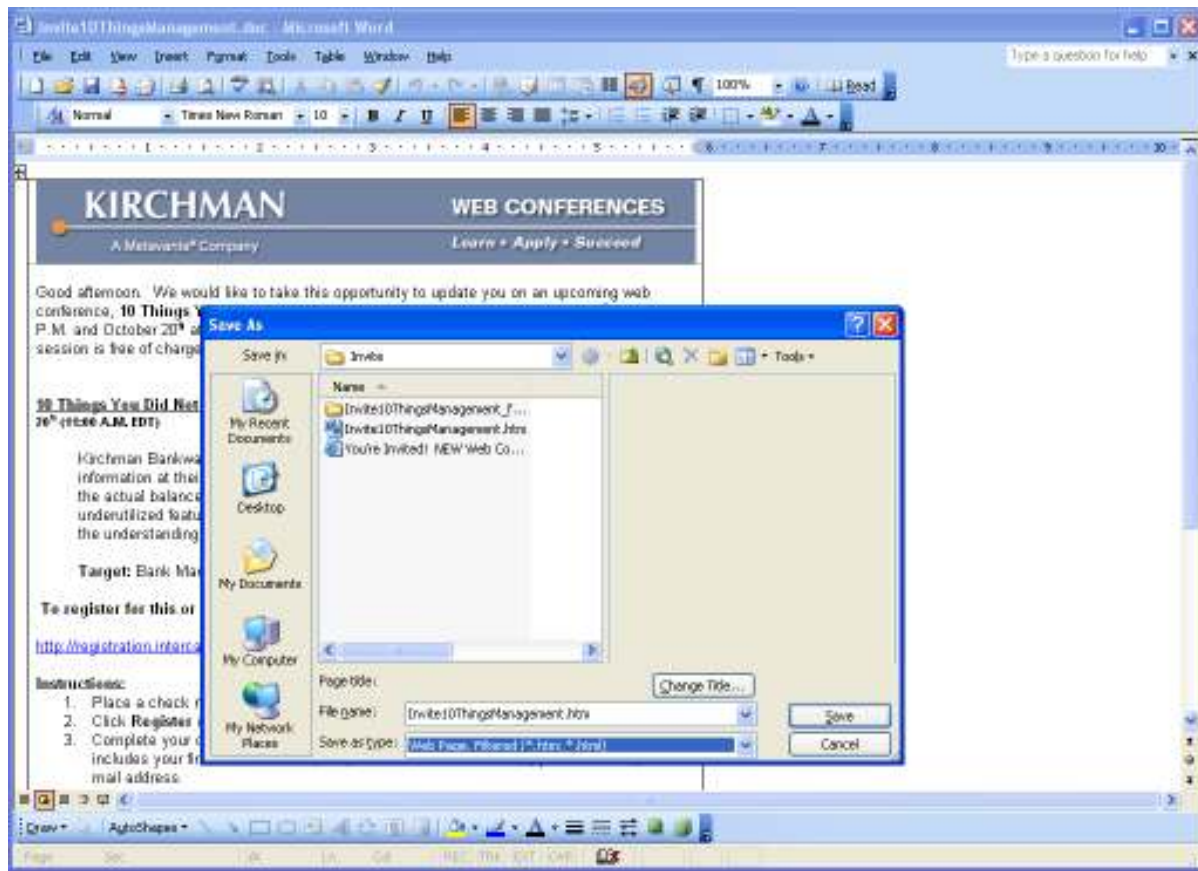
Your campaign has been sent out.

### **Creating the Invitation**

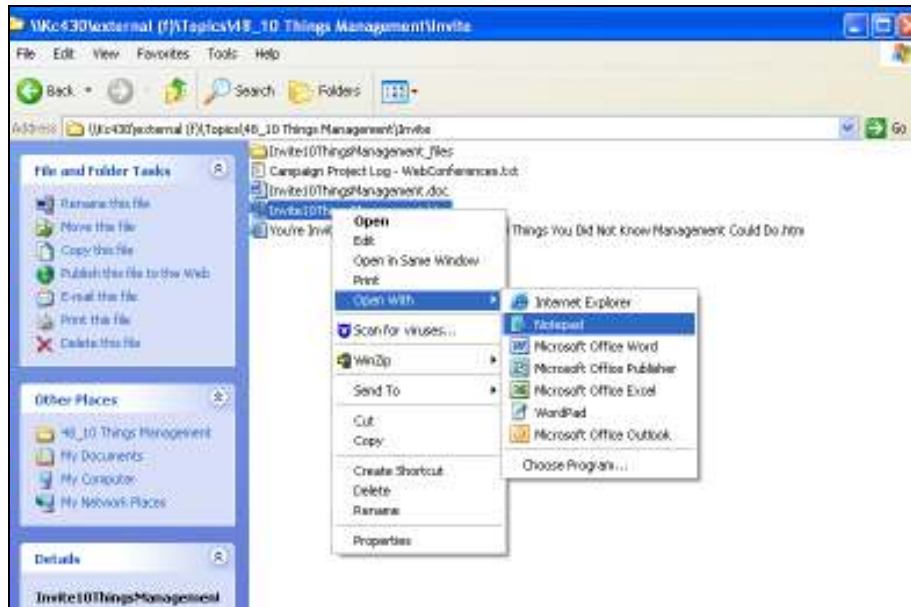
1. Go to F drive and click MasterInvite.doc
2. Change the appropriate fields.



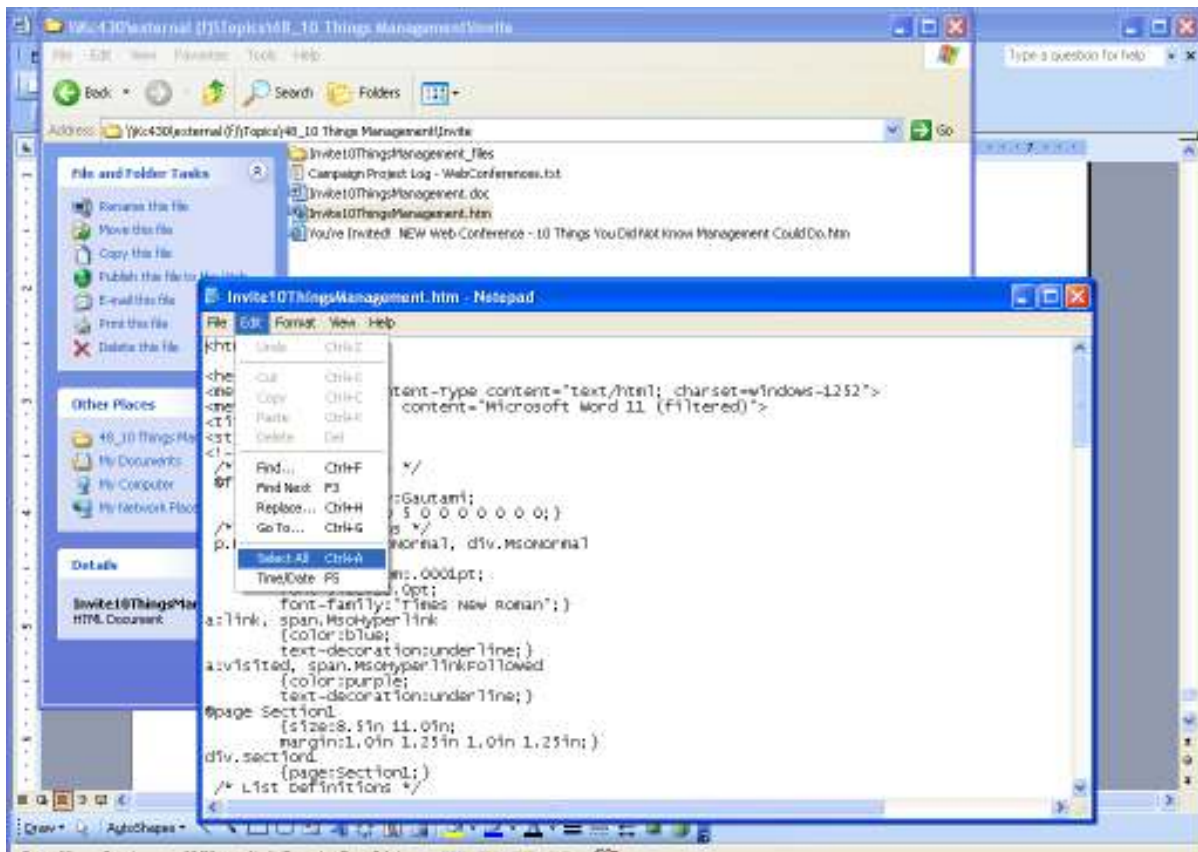
3. Save as InviteNAMEOFSESSION.doc
4. Save it under the session folder, under Invite folder (may have to create).
5. Open InviteNAMEOFSESSION.doc.
6. Click FILE, SAVE AS.



7. Change SAVE AS TYPE to Web Page, Filtered.
8. Click SAVE.
9. Close Word.
10. Go to the F drive, name of the session folder, Invite folder.



- 11. Right-click the invitation ( .htm version)
- 12. Click **Open With > Notepad**.



13. Select **Edit > Find**.

14. Search for "img" (which stands for "image").

The content following it will be different for each session. However it will always read, "InviteName\_files/image001.gif". This is the call to the image that is stored on the web server. You need to point to this one, otherwise nobody will be able to view your header image.

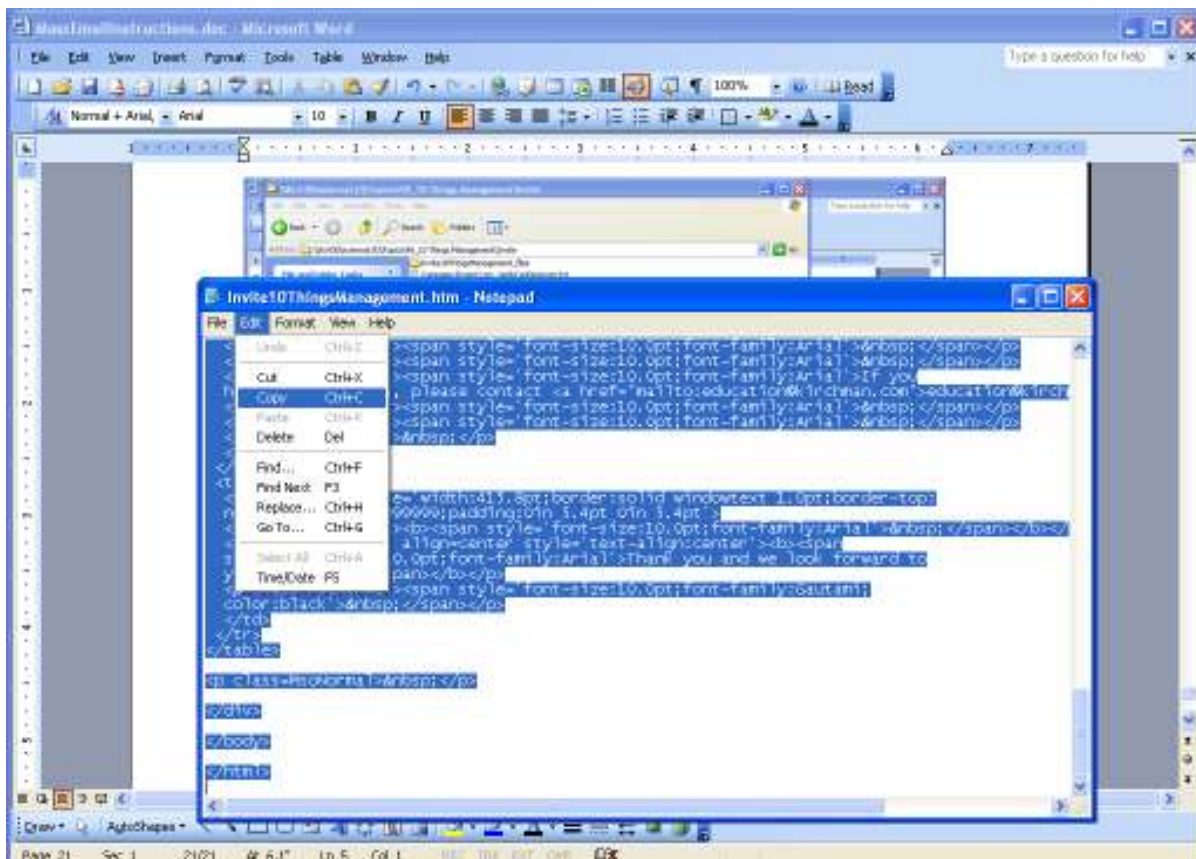
```
<td width=554 valign=top style='width:415.8pt;border:solid windowtext 1.0pt;
border-bottom:none;padding:0in 5.4pt 0in 5.4pt'>
<p class=MsoNormal></p>
</td>
</tr>
```

15. Remove everything between the quotation marks and replace with:

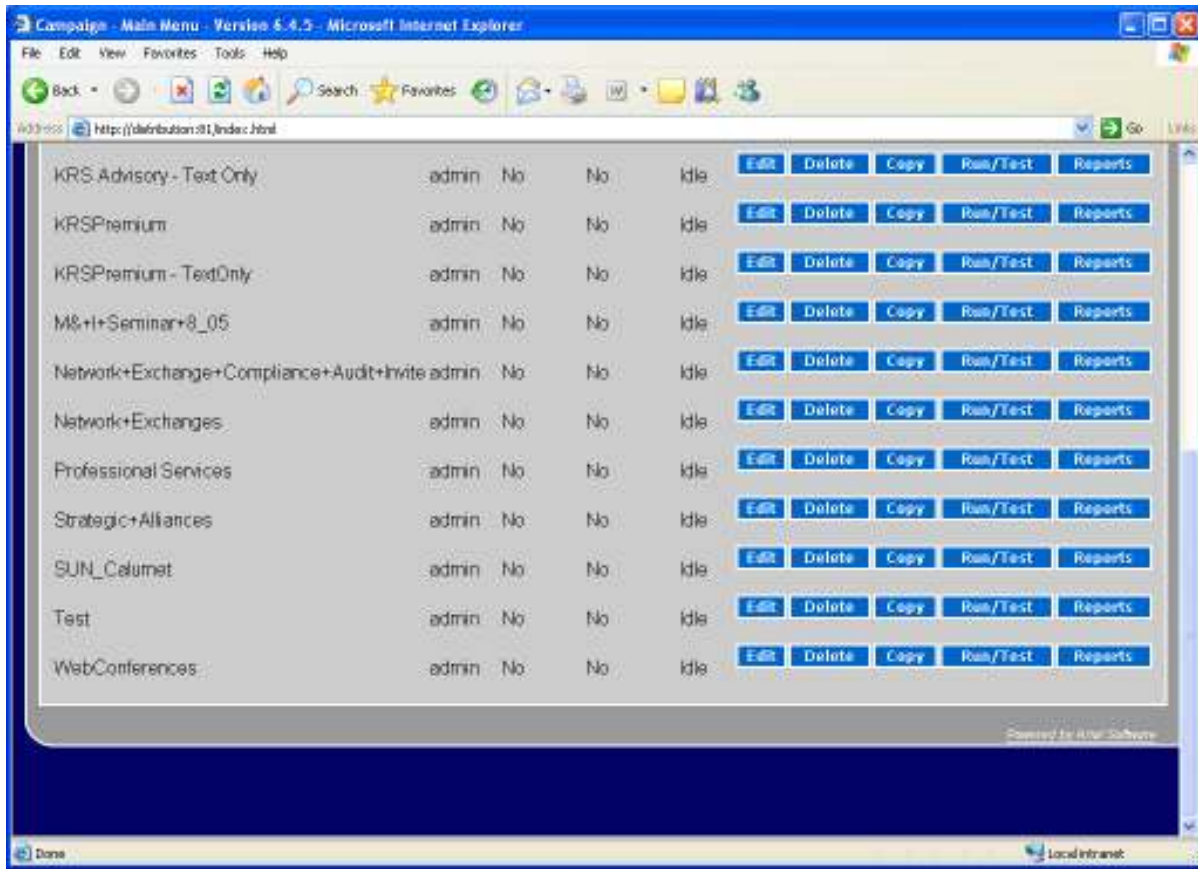
- <http://www.Metavante.com/images/webconfheader.gif>

In some cases, you may need to change the image in two places. In this scenario, there is only one.

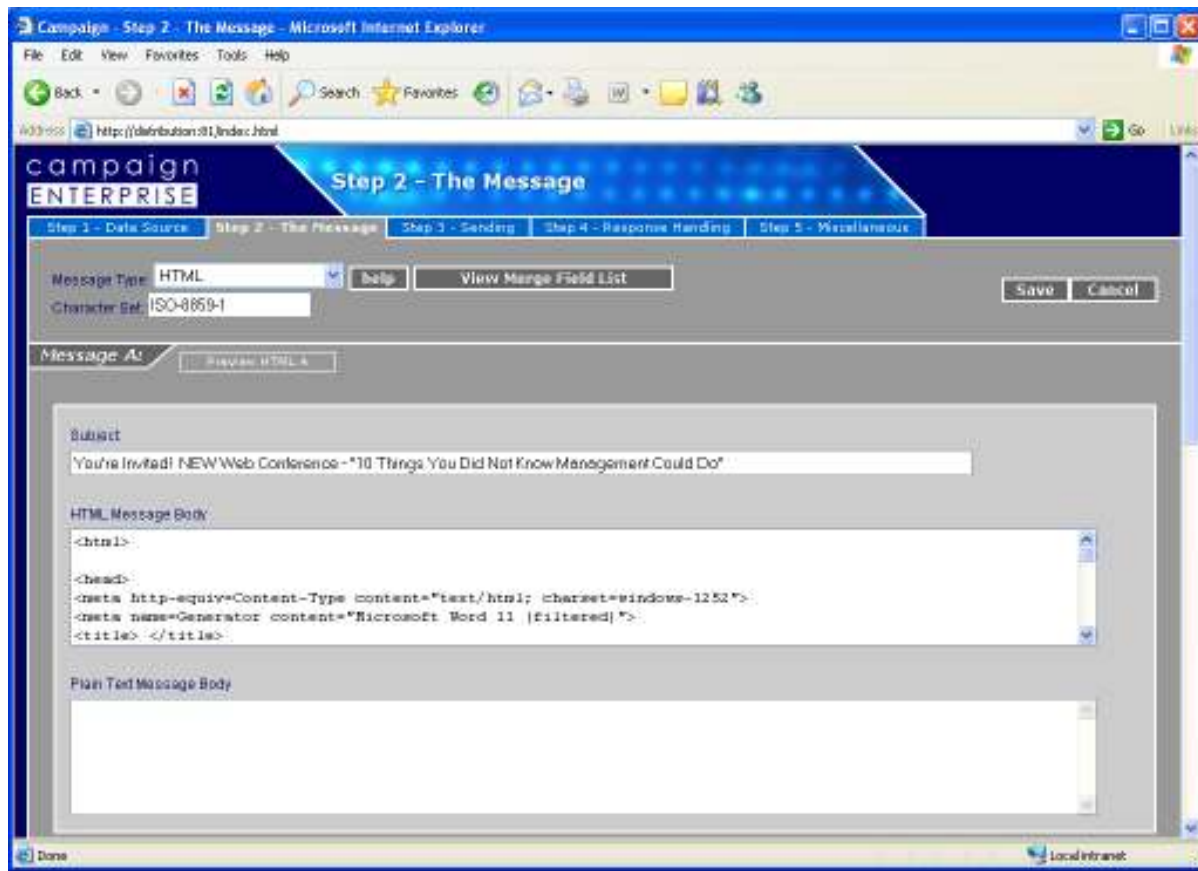
16. Click EDIT, SELECT ALL.



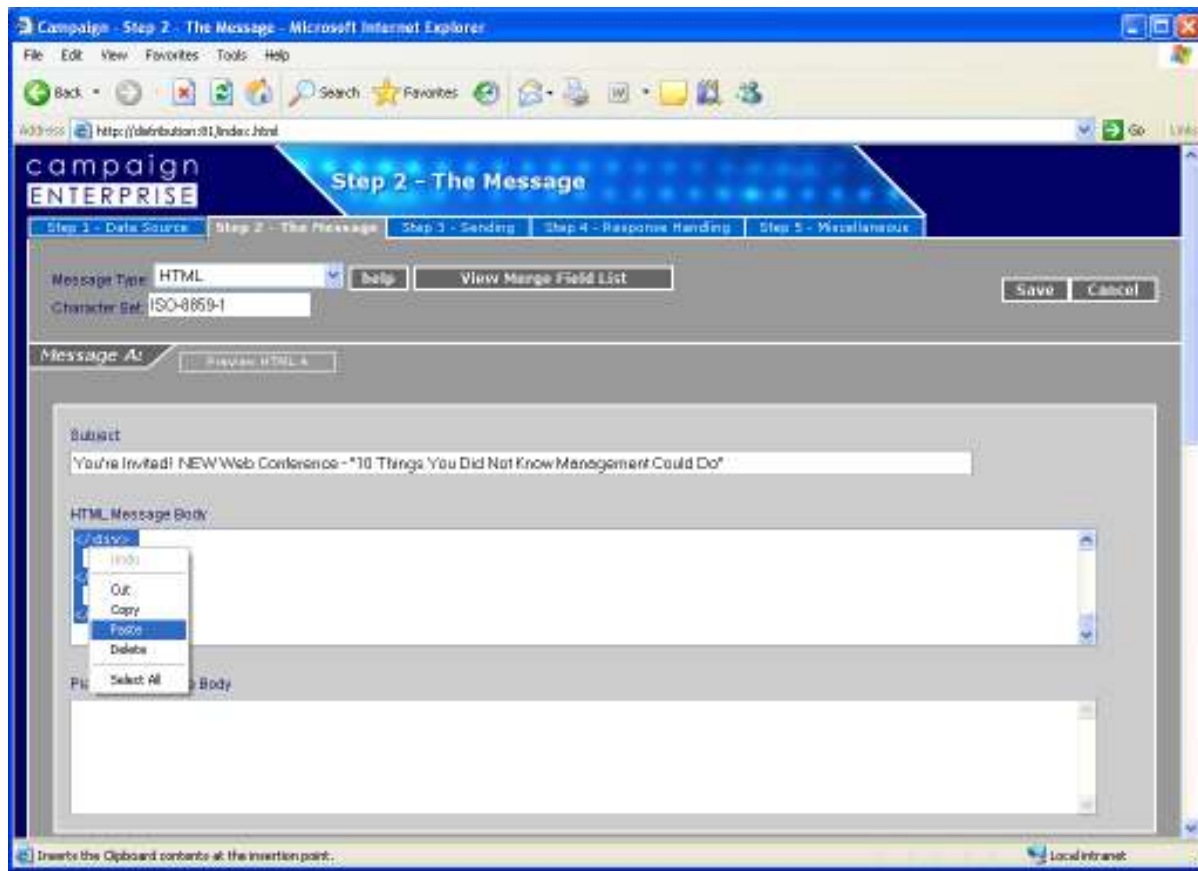
17. Click EDIT, COPY.



18. Go back into Campaign and click EDIT for WebConferences.



19. Click the "Step 2 – The Message" tab.



20. Highlight the contents of the HTML Message Body area.
21. Right-click your mouse while the area is highlighted and click PASTE.
22. Click Preview HTML to test your invitation. It should look and read as you expect. You should also see your image.
23. Click SAVE.



## Development Checklists

### **Web Conference Production Check List**

Once topic has been chosen and finalized with corresponding individuals follow this check list. Please see standards for "choosing a topic" on page \_\_\_\_

Topic Kick Off- Prepare and provide agenda to those who have confirmed attendance at least one full day prior to Kick Off meeting day. Goal of meeting is to define the specific focus and direction of the decided topic. Get information and input from all divisions. Schedule meetings with your SME to get more specific information for your script, and let them know then, when they can expect a copy of the script for their review, according to the production time line schedule.

Follow production time line for script production process.

- Description, Invitation, Promotion
- Script Research
- Script Writing, and PowerPoint presentation
- Script Review and Editing
- Overview Material Creation
- Session Templates Build
- Session set up on Live Meeting
- Format survey results after session
- Q&A sent to client care
- Q&A responses sent to customers
- Update Quarterly Report

Do Audio and Visual testing day of conference (Please see "Web Conference Day Checklist on page \_\_\_\_)

### **Web Conference Checklist**

Do these items the day of the session:

- Confirm Meeting IDs
  - Go to the Live Meeting web site and identify the Meeting ID
  - Go to the Reminder e-mail on the Intercall web site and identify the Meeting ID sent to the customers. This should match the one in Live Meeting. If it does not, Intercall wins and you need to adjust Live Meeting.
- Access the Live Meeting session as a Presenter. Your screen name should be “Metavante Bankway”
- Load three slide decks (expect to take about 12 minutes)
  - Promo slide deck (takes about 9 minutes)
  - PowerPoint Template (takes about 40 seconds)
  - Closing slide deck (takes about 30 seconds)
- Select the Promo slide deck and then select **View > Automatic Cycling**. In the dialog box, click **Start**. The slides will change automatically IN THIS SLIDE DECK every 15 seconds.
- Select **Attendees > Attendee Permissions**. Deselect **See Attendee Pane**.
- Log out of the session when you are done.
- On your Windows desktop, place shortcuts to the Flash files that make up the final show. Make sure the location is convenient and easily accessible during the presentation.
- Acquire a correct copy of the session’s script.

Do these items about 30 minutes or so before the session:

- Access the Live Meeting session as a Presenter. Your screen name should be “Metavante Bankway”
- Select yourself as the Active Presenter and lock other presenters from changing the slides.
- Test the Survey slide (in the Closing deck)
- Log into the session as an attendee from another EASILY ACCESSIBLE computer with the screen name of “Support”.
  - Confirm that slides are changing and that you DO NOT see the attendee pane.
- On the Presenter machine, make “Preview” attendee a presenter.
- Launch the Background Music MP3 file in the media player of your choice. For this use, I prefer iTunes.
  - Pause the music
  - Move the playhead to the beginning of the file.
  - Minimize the application
- Launch Segment 1 of the session.
  - It will be paused on a white screen
  - Maximize the presentation to fill your screen
  - Go back to Live Meeting without minimizing the presentation.
- If you are recording the session (mainly new sessions), test the connection and when you are done, select to stay connected – DO NOT DISCONNECT – you will have the whole dialing in process as part of the recording if you disconnect and need to reconnect to record.
- Unplug your speakers and plug the Omnicron box into your speaker connection
- Dial into the session on your phone as a Moderator
  - 1-800-717-1692 and the Moderator code is 194094.
  - Test your Music - If you hear it through the phone, it is working.
  - Test the Segment 1 audio through the phone – If you hear it, it is working.
  - Relaunch Segment 1

**CD Production Check List**

CD's come from web conferences that have previously been aired, and therefore created. Once the decision has been made as to what topic will be released for CD sales, then follow this list as a check point to make sure all items have been covered.

- 1. Access Topic information from Hard Drive and Follow "CD development Standards" directions for CD production.
- 2. Create Marketing Material
  - Invitation for Mass e-mail
  - Verbiage for Registration/ordering site
  - PowerPoint Slides with Verbiage for web conference promotion
  - Flyer for SAMs to send to customers
- 3. Informational Sheet for SAMs
  - Details on what the product offers, and what it is.
- 4. Pull CD orders from registration web site
- 5. Go to Metavante Database, and find Corresponding SAM, Update order sheet with SAMs name.
- 6. Send order information to Word Processing for invoice production (please see "Creating Spread Sheet" Guidelines). A soft copy of the invoice will be sent to the corresponding SAM, for their own use.
- 7. You will receive one hard copy of the Invoice with an envelope for each invoice. Make 3 copies of that invoice
  - Copy for you
  - Copy for Finance (Send Interoffice)
  - Copy for Corporate File (Send Interoffice)
- 8. Send Invoice to Customer
- 9. Check Cash Card (weekly) for Payment of CD's
- 10. Upon receipt of payment; package CD's in Cases, insert label into cases, Request "Thank you" letter, and envelope label from Word Processing, Fill out Delivery form (accessible through Intranet), Once Thank you letter is received, Package CD, and Send
- 11. Send e-mail to customer confirming shipment of CD
- 12. Update spread sheet.

## Saving Files on Hard Drive

To keep this organized and uniform it is important that the following guidelines be followed:

- Save each topic with a number\_topic name. For example, Opening commercial accounts was topic number 56. When creating a new folder in the topics folder of the shared drive you must save it at 56\_Opening a commercial account.

There are times when the name is too long. Shorting up the name is not a problem, as long as the correct number is placed before the name.

- Inside each topic folder is where you will save all of the information you gather throughout the script writing process. There are some main folders that are needed. A rough draft folder. This folder will contain the many version of the script that may be created due to edited versions, and PowerPoint versions of the script. Another folder is the Web conference folder. These should be titled "Web\_Conference\_MM\_DD\_YY."

## Script

### *Writing the Script*

By far, it is the hardest, most time-consuming portion of running a Web conference. This is the main reason you need your Subject Matter Expert and scheduled topic early. The other reason is Marketing. We have identified that it can take as much as 10 to 12 hours to write a script and get it approved. The wider the scope of the topic, the longer it will take to script. For example, "Hidden Gems" and product release sessions cover lots of information and many disciplines, and therefore require several Subject Matter Experts.

The scripts follow a standard format:

- Intro – Standard
- Objectives
- Content and Quizzes
- Repeat objectives
- Q&A gathering – Standard
- Survey – Standard
- Educational Workshops -Standard
- Registration – Standard

Everything except the Quizzes and Content are boilerplate. They only have minor changes per script. To fill about 40 minutes worth of time, you need about 10-12 total script pages. This will depend on writing style (tends to be in the bullet lists)

Content can come from any source, including Headquarters, Subject Matter Experts, Banker's Reference, Procedure Guides, etc. Get creative. We have full license to plagiarize Metavante content.

There is a standard format for writing **Awareness** sessions, which is about 80% of what you will write.

**SEGMENT 1**

- Objectives
- Benefits
- Features

**SEGMENT 2-3 or 4**

- How Do I Do Stuff

**LAST SEGMENT**

- Implementation – if necessary
- Education offerings – if appropriate
- Closing

Sometimes, we will write Top 10-type sessions or high-level sessions that cover many topics. If you do this, adjust your outline to be:

**SEGMENT 1**

- Objectives
- Benefits
- Features
- How Do I Do Stuff (very brief)

**SEGMENT 2-3 or 4**

- Benefits
- Features
- How Do I Do Stuff (very brief)
- Benefits
- Features
- How Do I Do Stuff (very brief)
- Benefits
- Features
- How Do I Do Stuff (very brief)

**LAST SEGMENT**

- Benefits
- Features
- How Do I Do Stuff (very brief)
- Education offerings – if appropriate
- Closing

The new script gets approved by the Subject Matter Expert, and George Jennings (when possible). Before you can consider a script “good for recording”, Client Care must review a copy, specifically through Tony Cory. Then you can consider the script finished.

Many times, on deadline, I will record what I have and just edit the vocal recordings as the edits come in. This is partly why we record internally and sacrifice a small bit of audio quality.

## **Introductory Information**

All scripts have a standard introduction.

This is the current boilerplate introduction. The session title is the only thing I usually change.

*Hello everyone! Welcome to Metavante's "**Bankway 101 – Management Information Basics**" web conference! I'm Barry Nadler and I'll be your host for today's conference.*

*If you need assistance during the session, we ask that you utilize the Seating Chart next to the Question & Answer box. If you don't see this Seating Chart, please select **View > Restore Default Layout** from the menu. This will adjust your console to have the correct information. Click the drop-down menu to select your Mood. For example, if you need assistance you would change your mood to RED which alerts us to your need. We would contact you via the chat feature. Once everything has been taken care of, you may then change your mood back to GREEN. At this moment, everyone please put your "mood" to purple to signify that you can hear me. Great! Now let's all start the session on green unless you are experiencing an issue.*

*I want to take a moment to set the expectations for our Bankway Awareness web conferences. These focused sessions average 45 minutes and provide you with awareness and educational information, while not disrupting your daily schedule. However, live, interactive discussions are not part of this session.*

*In some cases, our customers have asked for additional, interactive and hands-on education. We are pleased to announce and recommend our educational workshops. We will review this workshop schedule at the end of the session.*

*Now, before we get into our presentation, let me take care of just a few housekeeping details.*

*During this session, we will be taking questions from the audience through our Question & Answer window at the bottom portion of the screen. Type a question and click ASK. We will pass these questions to our Client Care Division and forward the answers to everyone in the session within 48 hours, at least that is our goal.*

*When you received your email with this session's information, there was a link to some documents for this session including an Overview. If you did not have an opportunity to download or print this information, when the session is over you may refer back to the email you received and click the link for the session materials. If, for some reason, you did not get the e-mail, or you were unable to download the documents, please send an e-mail to our e-mail address [bankwayawareness@Metavante.com](mailto:bankwayawareness@Metavante.com), and we will gladly forward them to you. Once again, the e-mail address is [bankwayawareness@Metavante.com](mailto:bankwayawareness@Metavante.com).*

*Lastly, if you would like to view this session in a full screen, you may press F5 on your keyboard at this time. If at any time during the session you wish to ask a question, just press F5 again and you will return to the Live Meeting console. Follow the instructions I just provided to ask your question, and then press F5 again to go back to full screen.*

*With that, let's get right into the session.*

## Writing Objectives

We started using objectives for several reasons:

- Objectives provide a **clear understanding of what is covered** in a course or session and what you will be expected to take away from it when it is completed.
- Objectives are the **basis for the evaluation** of the course. If the viewers believe they are able to achieve the objective, the course was a success – if not, it was a failure. This is the most important!
- They also provide a **roadmap for us, the designers**, to identify what needs to be in the session – the “need to know” content.
- These can become **part of the overview**, thus allowing trainees to sell the session to their managers.
- They will also **assist** in driving quiz questions.

### Objectives are not goals!

Goals refer to the session; objectives refer to the trainee performance.

These need to be performance-driven and measurable. Here are the Credit Facilities objectives as a sample.

- Explain how a credit facility works.
- Describe the steps that must be taken prior to setting up a facility account.
- Explain which account comes first and why – Credit Facility or a loan. Explain the process if the opposite occurs.
- Describe the single most important benefit of using the Windows version of Credit Facilities
- Diagram out and explain how a bank can set up a letter of credit using Credit Facilities – simple structure versus more complex structure.
- Explain how Credit Facilities can be used to manage a small Dealer Floorplan portfolio.

Start with the end in mind. Where do you want the audience to be when you are finished?

One Idea:

*My personal opinion is that Web conferences will not acceptably teach solid procedures to the viewers. I believe they are excellent for theory and concepts along with showing how to do something. But, we cannot expect that they will remember all the necessary steps to complete the task. They may not touch Metavante Bankway for several days, and it is possible they do not have access to the features we are presenting, thus negating that portion of learning. I like to provide objectives that have to do with verbs like “describe,” “explain,” “diagram out,” “identify,” or “provide information relating to....” I think we are setting our Web conferences up for failure if we expect our viewers to “enter a new client and sell them a business checking account,” for example. This requires their ability to remember all the steps. Your session will be more effective if you have the objective to “describe the steps needed to create a new client” and “Explain how you sell a business checking account to an existing client.”*

*These statements are negated if you are training a VERY focused topic and you can get detailed. Do not try to do this with a broad topic.*

*I have been playing with the idea of not being so formal with the objectives and moving to an overview at the beginning and summary at the end.*

### **Creating Content**

Things to consider are relationships in the content – order of operations, best practices, features that are related, but not specifically part of the immediate topic, etc. Look for “order of knowledge” items. Basically, this is “they need to know this before you can teach them that...” This will assist in structuring the content.

Once you have this, attempt to marry it to the objectives of the session. If you have to, reorder the objectives, allowing the viewer to get a presentation order from the objectives.

The content should not be a straight-forward “how to.” Keep the WIIFY (what is in it for you) in mind. There needs to be examples and business scenarios along with the advantages to the clients.

Think of the session as a story. Your session should have four to five clusters of information.

Some formats for the information include:

- Chronological
- Issues/Actions to solve issues
- Opportunity/Leverage
- Features/Benefits
- Case Study
- Top 10 Reasons for....

### **Quizzes**

We are using quizzes to prove to the viewer that they have learned all the main points of a session – the objectives.

There should be a quiz after every cluster of information, therefore about four to five short quizzes. This eliminates the need for a long quiz at the end. It also creates a stronger feeling of interactivity with the session.

These quizzes should highlight the single-most important pieces of information from the segment. Expect about three questions.

You can have either Multiple Choice or True False.

Create transitions into and out of quizzes. Think of them as a commercial from the content. When you watch a talk show or the news, they promote what is coming in the next segment. Because we are live during the quiz, we should have some lead in rather than “So, now let us get back to the session.”

Because these are polls in the session, you can immediately discuss the correct answer and show everyone how the other participants answered (as a group, not individually).

Make sure the presenter knows the correct answers for the quizzes. If it is a True/False question, and the answer is False, create an explanation of why it is False. When you have incorrect answers, it is useful to the viewers if you can identify, for them, why these answers are wrong.



## The Closing

This covers everything that happens after the ending session objectives until the end of the session. It is fairly boilerplate, but due to the promotional nature of the information, it will change every session.

Currently, the closing covers a few items:

- Q&A
- Survey.
- When we will rerun this session
- When the next session is
- When the next new session is

If we record the session so they are constantly available, some of the promotional information is not valid anymore.

Here is a standard closing:

### ***(Push out the survey)***

*Before we close out today's session, we would like some feedback regarding this session. As you know, this session was free of charge. The only fee we ask is that you provide some feedback on the session. Your input is important and we need to know how we are doing and if you want us to continue to offer you training in this manner. Just answer the few questions and when you are done, click Submit at the bottom. When we come back, we will review our upcoming Educational Workshop schedule and take a look at some of the web conferences that are available for registration. I will play some music for about a minute and a half.*

### ***(Play Background Music)***

*Thank you for your feedback. If you have not finished the survey, please go to the bottom of the page and click Submit so we can capture what you have finished. All feedback is important.*

*Well, that wraps up our discussion on "**Bankway 101 – Management Information Basics**" for today. As I stated at the beginning of the session, we have taken questions during the session. If you would like to enter a last-minute question, let me remind you how to do it. There is a Question & Answer box on the bottom of your screen. Type a question in your text box and click **ASK**. We will receive your questions. Then, we will get these answered for you. Once we get the answers, we will send them out to all attendees within the next 48 hours, at least that is our goal.*

### ***(Show Workshop Schedule)***

*Got Education? Here is our schedule for upcoming Educational Workshops. These workshops occur here, in Orlando, FL. There are fees attached to them. As you can see from this slide, our upcoming educational workshops are...*

*If you are interested in any of these workshops or would like more information on them, please contact your Strategic Account Manager or send an e-mail to our education division. They now have the e-mail address of [education@Metavante.com](mailto:education@Metavante.com).*

***(Push out the registration page)***

*Now, let me take a moment to show you our upcoming web conference schedule. Many of you have already seen this. Please feel free to register for any of these sessions. All you have to do is select the sessions that are of interest to you, and click "Register". You will receive an e-mail with confirmation and session information. If you want to come back to this page later, just go to our web site, [www.Metavante.com](http://www.Metavante.com) and view the Calendar. You will find a link to this page there.*

*As you can see from this registration calendar, our next web conference is on ...*

*If you are in full screen mode, please note the dim icon in the bottom-left of your screen. Please click this to get back to the session console when you are done viewing the registration page.*

*We hope that you've found today's session to be both interesting and a valuable use of your time. On behalf of all of us here at Metavante, I would like to thank each of you for participating in today's web conference.*

*Have a great afternoon and I am sure I will see you again in some of our other sessions.*

*Thank you and you may now disconnect from the session.*

Per session, the bold items change.

### **Q & A Session**

In response to several changes, we have altered the Q&A session. Three of the main things causing this change include:

- Running of sessions more times in a day
- Not wanting to put Client Care "on the spot"
- Availability of representatives

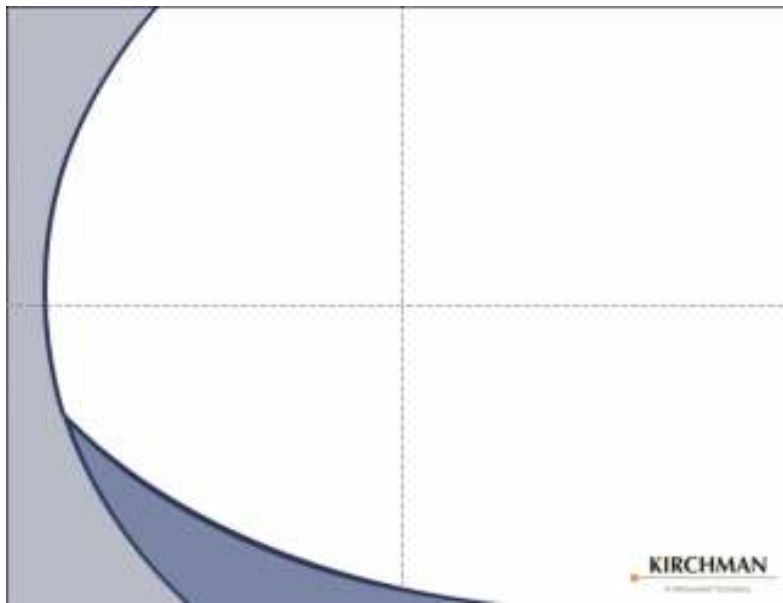
To meet the need for Q&A, we are offering to accept questions in the form of Questions & Answers during the sessions. After the sessions, we save the Questions & Answers, extract the questions, and forward them on to Client Care for an official response. We request 24 hours for Client Care and promote approximately 48 hours to the client.

When we distribute the answers to the client, there are no bank names or banker names. Just the question and the answer are visible.

We send a different version internally. This one contains the bank's name. The person who asked the question, the question, and the answer.

### **PowerPoint Standards**

- The visual side of our web conferences are developed in PowerPoint (PPT) and later converted to Flash, at the time of audio recording.
- Each segment of a session will receive a separate PPT file. Therefore, any given session may have 3-4, and sometimes 5 separate PPT files.
- This section is not designed to teach you PowerPoint. If you don't know how to make these items work, please ask. These are merely the rules by which we develop.
- Here is what the background template looks like. It is designed to have only 256 colors. This translates better through Live Meeting. The backgrounds size is 7.5 X 10.



- We use regular bullets and the standard fonts and formatting that comes with a new PPT file (Arial).
- We do not bold headings. They stand out plenty because they are large fonts.
- When we set up the background, we use the Slide Master view for a bulleted list. This is what the Master looks like. Notice that the text boxes are brought in a little on the left side due to the “swoosh” in the graphic.



### Textual Rules

The most important item you can remember is that PPT is not Word. Slides are not designed to be for writing prose. PPT is definitely a situation where less is more.

If you bring over content from your script, make sure to cut it down to the barest amount of text possible. For example, you may say something like *"The man went down to the lake. He took his dog out for a nice day of fishing. He caught only small fish, which he threw back."* Here is how you can present this content in PPT.

**What He Did**

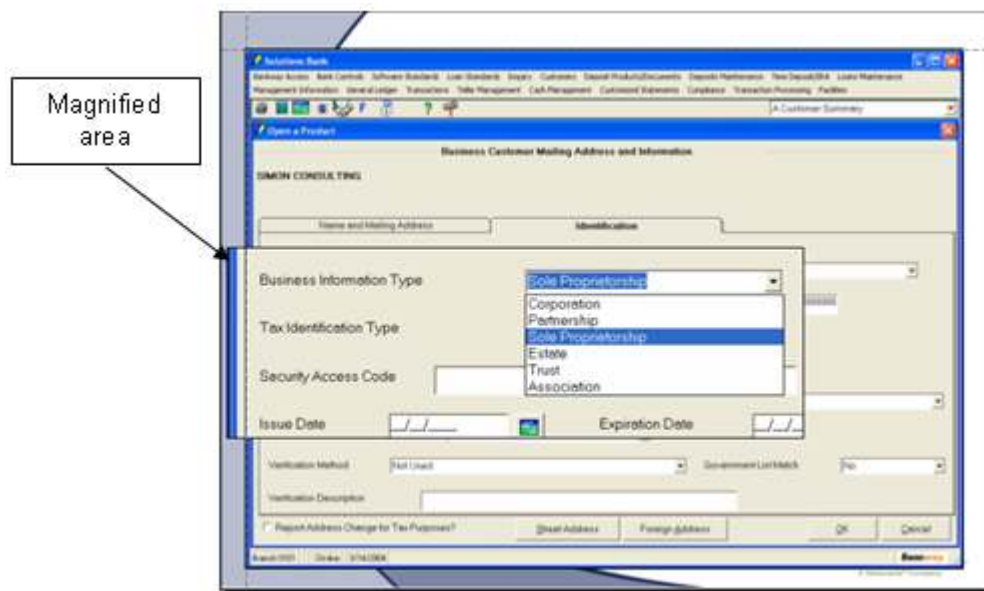
- Went to lake
- Took dog
- Caught only small fish
  - Threw them back

You might illustrate your point with an image of fishing and a dog.

- Also, because these should not be full sentences, they do not normally receive periods at the end. However, you should capitalize each item.
- Given the "swoosh" we use in our background, watch where your last bullet item lands on the slide. Make sure you adjust the main text box as needed to keep the text on the white.

## Images on Slides

- The bulk of our web conference presentations revolve around screen shots from Bankway. Our two largest complaints we receive, regarding screen shots, are “more of them” and “they seem fuzzy and hard to read”.
- Well, we can accommodate the first complaint by providing screen shots when relevant, rather than a bulleted list.
- The second complaint is tied to some technology factors. We use JPG and/or GIF images on our slides. They have a low resolution by nature. We have tested many methods of image capturing and we have gotten basically the same results each time. SO, the solution to this is to drop in the entire screen snap and “magnify” the important section.



- This is a very simple effect to achieve. Simply capture your screen by using the Print Screen key on your keyboard and paste it into PPT. Once you size it and place it correctly, copy it and paste a second copy of this image on the slide. Use the Crop tool to crop out everything you don't want magnified. Now, merely resize the cropped image FROM THE CORNERS. “From the corners” is important because “from the sides” distorts the image, while the corners proportionally resize the image. Then, place this “magnified” image appropriately so it looks like it is slightly off from the image. This assists in the illusion.
- We seem to get good results from a full image of 7.5 x 10. If you place the image on the screen and adjust your guides to cross at the top-left, you can snap every screen shot into that intersection and they should all be the same size.
- In the way of images on a text slide, you need to keep the 256-color rule in mind. Because of this, photos do not work. You need to use clip art. There is a pretty good collection available for download on Microsoft Office's web site.
- Also, be aware that you are not required to keep clip art as you receive it. Any given image is a set of grouped images. Therefore, you can select the clip art item and ungroup it. Ungroup it a second time and you will break apart all the little pieces that make up the image. This allows you to change the background color or predominant color to match your presentation's color scheme.

## Session Materials

These materials are available to our viewers through a download link.

The materials are:

- Session Overview PDF
- Any other related files (Extra Materials PDF)
- ZIP file containing any related files and the PDFs

### **Creating the Overview**

The Overview for each session is created from the PowerPoint, with additions from the script. Statements and examples important to the session are included in this document. If necessary, diagrams or procedures are also included. We include a link to the Overview in the Registration email and the Reminder email.

Keep the Overview brief; however do not skimp on the significant detail.

The base of the Overview is a compiled version of the PowerPoint slides for any session. If we need to add commentary, we use the Notes View. When you have finished the Overview, merely print the file as a PDF, but print Notes pages. There will be one slide per page, so the file can get large (about 80+ pages).

### **Extra Materials PDF**

Sometimes, the information we present requires background or procedural information to go with it. Many times this information is too cumbersome to attempt to get it into the session. Therefore, we put as much of it in the Overview as possible. If any piece is more than about ½ a page, it will go into a second document, which we use to compile supplementary content.

### **ZIP File**

Due to situations outside our control, some banks have security issues downloading files. Therefore, we create a ZIP file of all the necessary files for the session and upload that.

### **Uploading Files for Customers to Download (FTP Site)**

For customers to be able to download the materials, you must place them on a web server for them to access them. We use the [www.Metavante.com](http://www.Metavante.com) web server. There is a folder on this server, called “bn”. We store all session materials here.

This means that the link you provide to the customers is ALWAYS <http://www.Metavante.com/bn/FILENAME.pdf>. Replace “FILENAME.PDF” with the actual name of your file. Most of the time, this file is a PDF file. You will need to place this link in the e-mails for when people register. THIS MUST HAPPEN TWO DAYS BEFORE THE EVENT OR YOU WILL RECEIVE CALLS!

### **To access the File Transfer Protocol (FTP) folder:**

1. Point your web browser to <ftp://www.Metavante.com>. The address will fail because you must log in. This is normal.
2. Select **File > Log in as**.
3. Enter “*kchbnftp*” as the user and “*clientevents*” as the password.
4. Now, just treat this as a standard Windows folder. Drag your files from one folder to the other. It will copy them from one network to the other.

## Developing the Media

Please see separate document on using Macromedia Captivate.

### Resource File Names

We have several different types of files we use for web conferences.

- **DOC** – These are Word documents that are research and source material, along with scripts and overviews
- **PPT** – These are PowerPoint files. They make up the visual source for most all the web conferences. We also use them as Live Meeting Templates (which, will be explained later).
- **PDF** – Any final documents that will go to customers need to be in this format. It is not easily editable, like a Word document would be.
- **CP** – These are Macromedia Captivate files. They are the source files for all our sessions, since about February 2005.
- **SWF** – These are the published files for the web conferences, CDs, or any other presentation method. This requires you to have the Flash Player on your machine to run it.
- **HTML** – These are web pages. This can be a session invitation or the web page “wrapper” that calls the SWF file. We do not use these in the web conferences, but we do for CDs and other presentation methods. When you use this file, you must have the SWF file with it, in the same directory.
- **WAV** – This is the highest quality of audio file exported from Captivate. It will export MP3 and WAV at the same time. When you have to import sound into Captivate and the source audio came from Captivate, use the WAV file when possible.
- **AW6** – These are playable Authorware files. They are older sessions and we try not to use them much. Any good sessions in this format should be converted to Captivate files. You must have Authorware 6 to run these.
- **AWR** – These are the source code for all the older sessions. You must have Authorware 6 to run these.
- **PSD** – These are Photoshop documents. They are used for graphic elements and the main menus for the CDs.

We work off of an external hard drive, which you can access by selecting **Start > Run** and enter <\\kc430f>. If you can not access this, it may be a sharing problem. Please notify Barry Nadler.

You will find all content for the web conferences in a folder called **Topics**. Each web conference is in its own folder.

Within each folder, in Topics, there are two other folders of importance: **Source** and **Final Show**. Some may have **Video** and **Audio** folders also. If you don't see **Final Show**, look in **Video**.

- **Source** – These are the Captivate files if you need to edit them for some reason.
- **Final Show** – These are the published HTML and .SWF files. You will also find any PDF files related to the session.

On the root (f), you will find two important PowerPoint files:

- **Promo Slide Deck 12\_05 LM.ppt** – This is the set of rotating slides that runs before every web conference. This set of slides rarely changes. The only changes that occur are to the workshop schedule and FURST dates
- **Closing Deck Template\_LM.ppt** – This is the set of closing slides that run at the end of every web conference. This set contains the Survey, a poll (in case the survey does not work), the Workshop schedule, and the web registration page.

For most sessions, you will find, within the specific **Topic** folder, a Live Meeting template. This is a PowerPoint we designed specifically for uploading into Live Meeting. We use “LM Template” as part of this PowerPoint’s file name. It contains the Intro slide, the necessary sharing slides, and the poll questions. You should never have to remake these, unless they get corrupt. If you ever upload one and identify an error when you look at it in Live Meeting, please go to the appropriate PowerPoint template and make the correction. This way, the template will be accurate for the next time you need it and you won’t have to worry about the correction again. If you want to edit or create a Live Meeting template, you need to [download the Live Meeting PowerPoint Plugin](http://office.microsoft.com/search/redirect.aspx?assetid=DC011870721033&url=http://www.microsoft.com) (<http://office.microsoft.com/search/redirect.aspx?assetid=DC011870721033&url=http://www.microsoft.com>.)

If you need backgrounds, they are stored in a folder called **Web Conference Media\Slide Backgrounds**. The correct background, for now, is **Web-Conf-Template-2005\_256.jpg**. There is another that looks just like it, but this one is 256 colors. This folder also contains the template Photoshop files for the CD menus and label, Metavante Logos, and a few misc. graphic elements.

There are two other folders within Web Conference Media: **AutoLauncher for CDs** and **Web Conference Recordings**. These are exactly what they say they are.

### ***Captivate Audio Glitch***

We segment our media files for two reasons.

- We want to have short segments and then pose questions based on these segments
- File size

With regard to audio, file size is the main reason. Captivate seems to have trouble with medium to large size files – It seems that about 40 slides with audio is close to the limit. When files get too large, Captivate corrupts the audio. This means that the audio will still exist in the source file and you will hear it if you preview the file. You will not hear audio if you publish it – and sometimes it cuts out halfway through the file, so the beginning sounds fine, but the back end is corrupt.

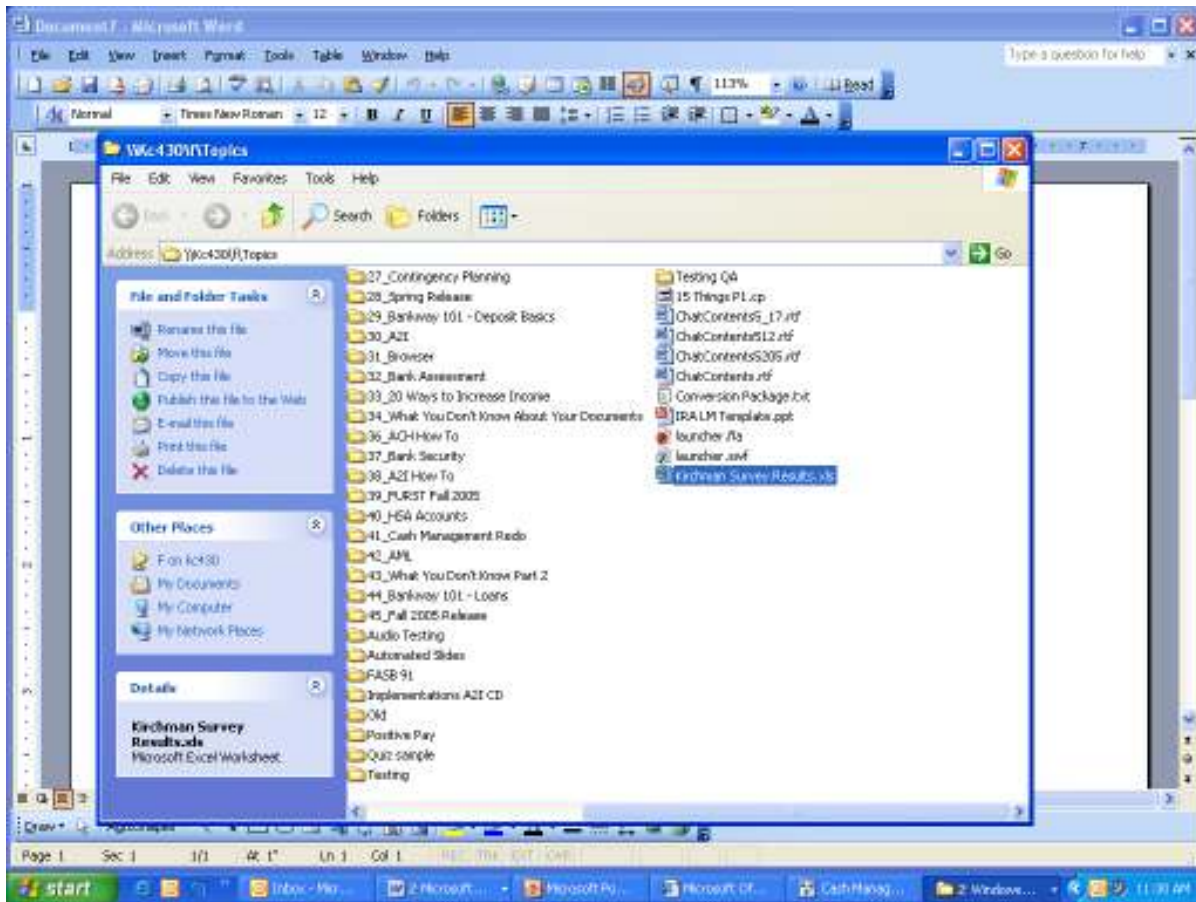
To fix this is fairly simple, but it can be time consuming. You can export each slide’s audio to your network. Then, re-import the WAV version of the slide’s audio on top of the old audio. Do this for every slide that has corrupt audio and re-publish the segment. We have seen this take about 35-45 minutes, if your whole segment corrupts.

## **Putting a Session up for On-Demand Access**



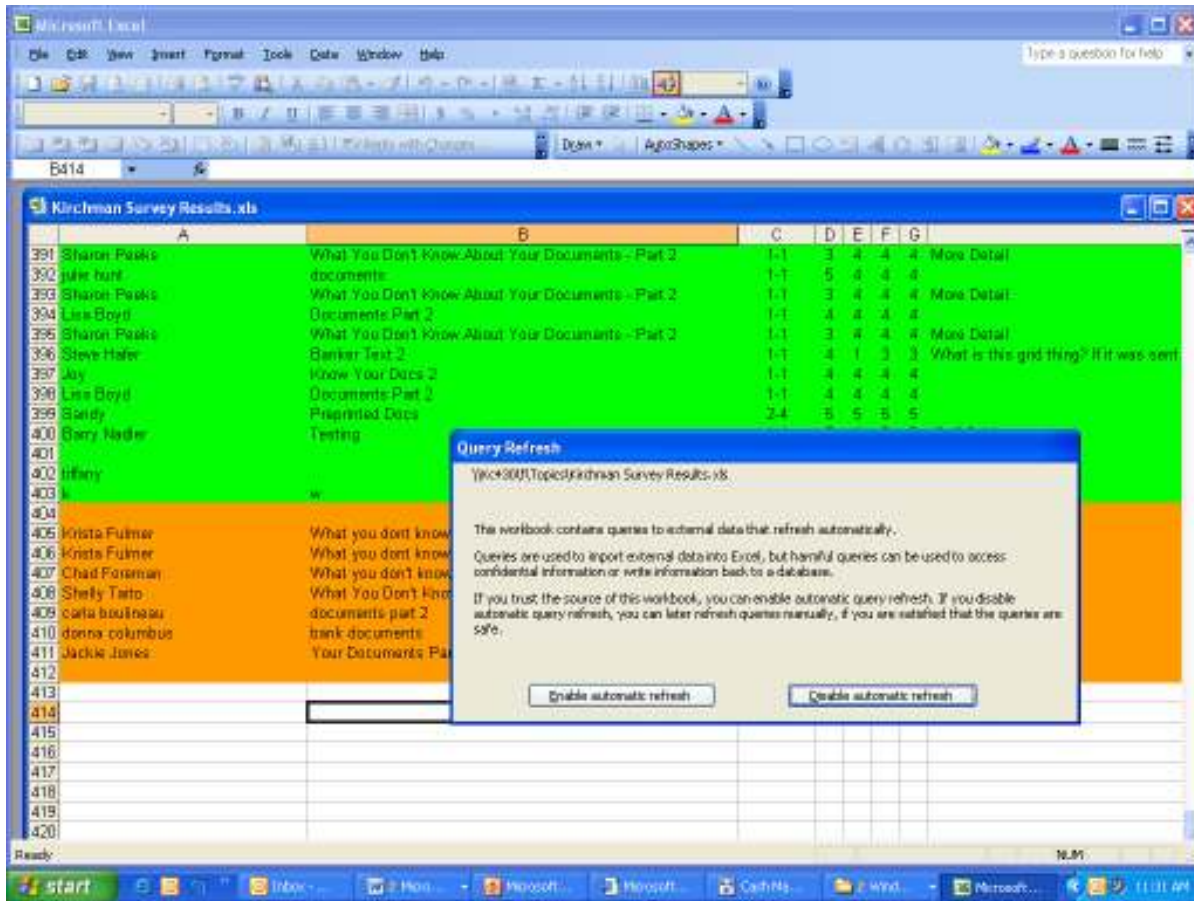
## Web Conference Post-Work

### Accessing and Saving the Survey Data

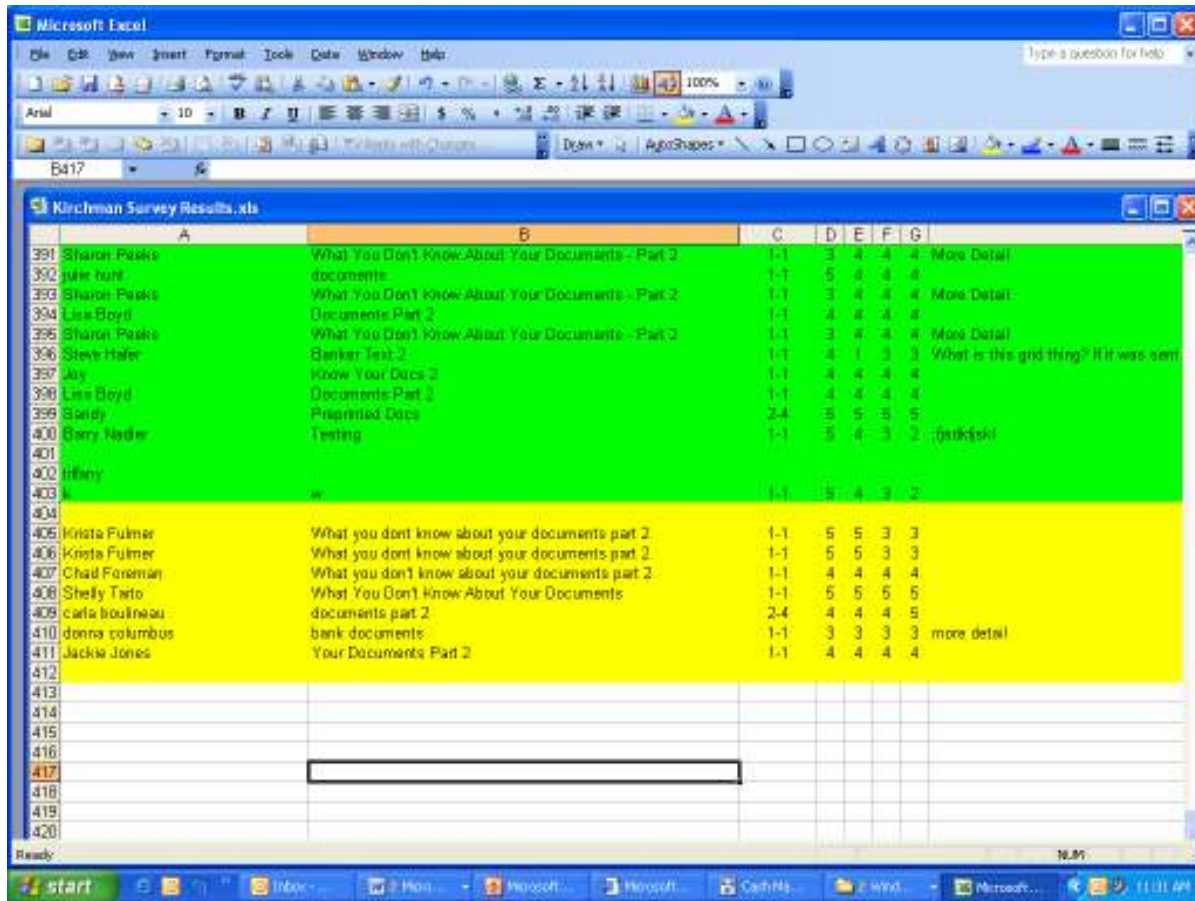


Go to <\\Kc430f\Topics>

Open Metavante Survey Results.xls



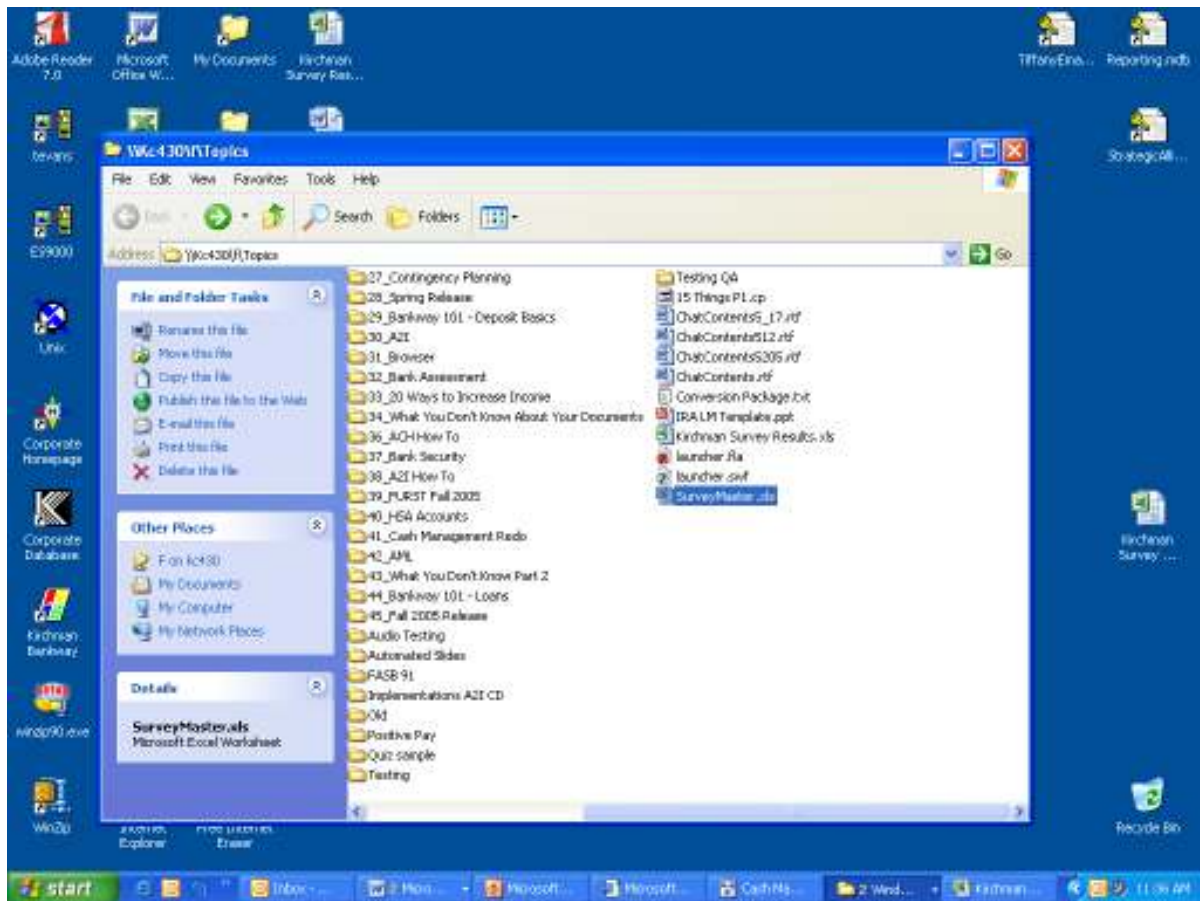
Click ENABLE AUTOMATIC REFRESH.



The most current survey results will be highlighted yellow.

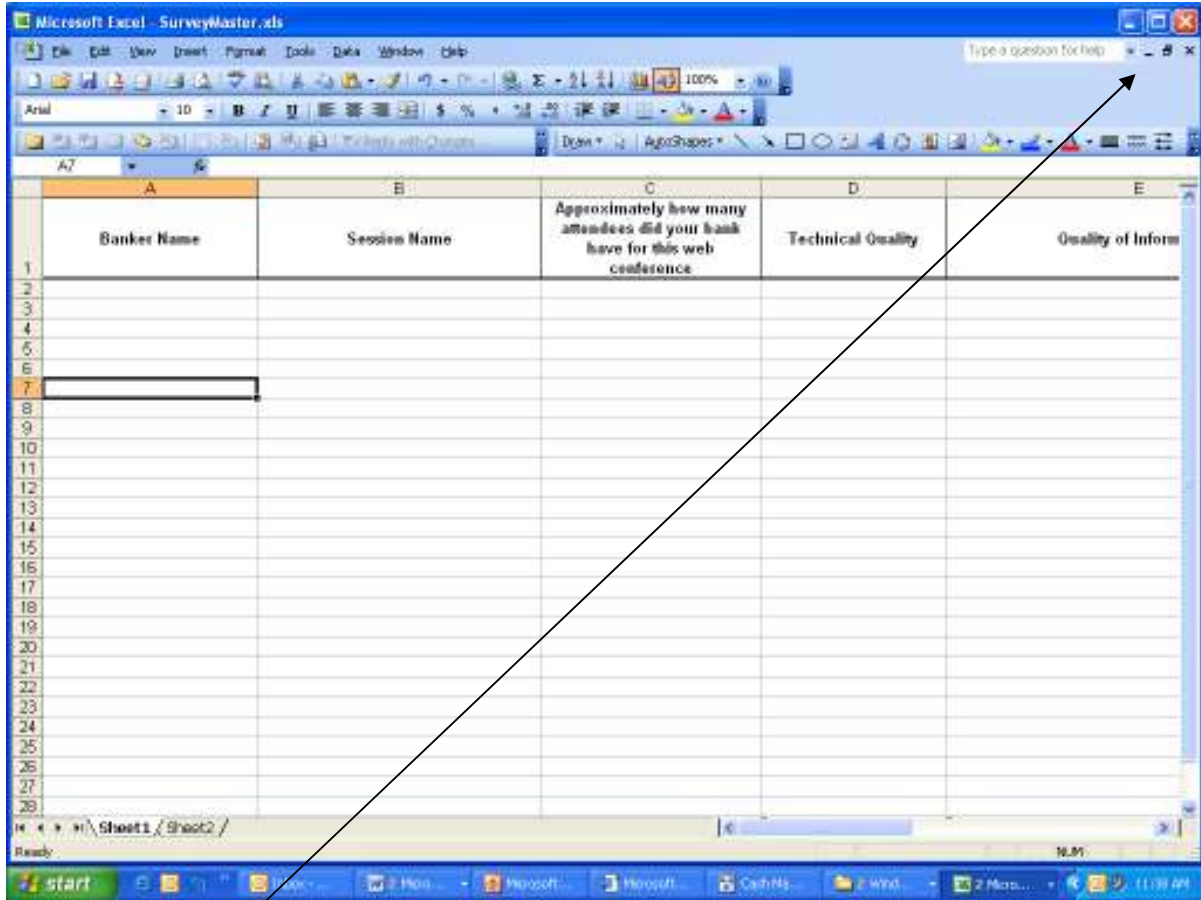
Once you have seen the most current results, change the highlighted area to another color (as you can see if you scroll up).

Minimize this screen.

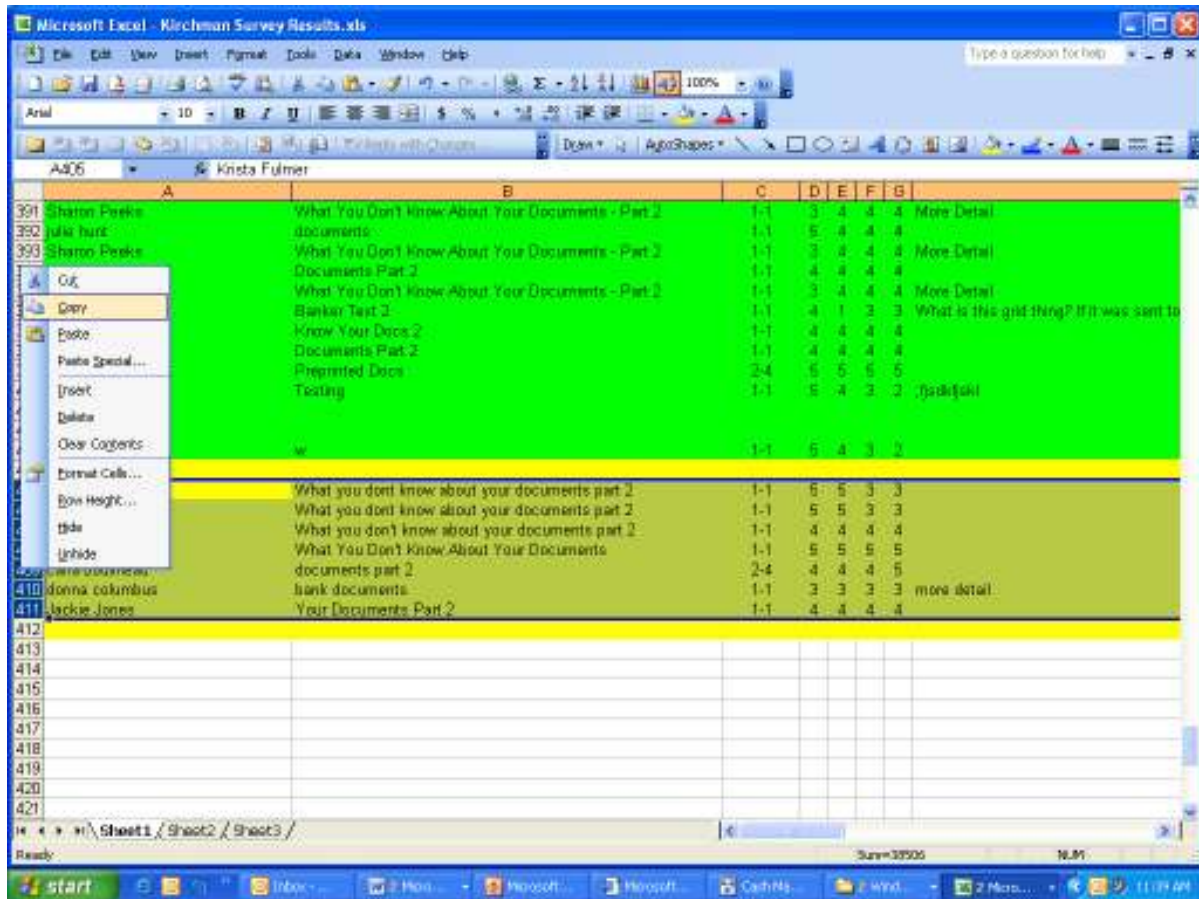


Go to [\\k430\Topics](#)

Open SurveyMaster.xls



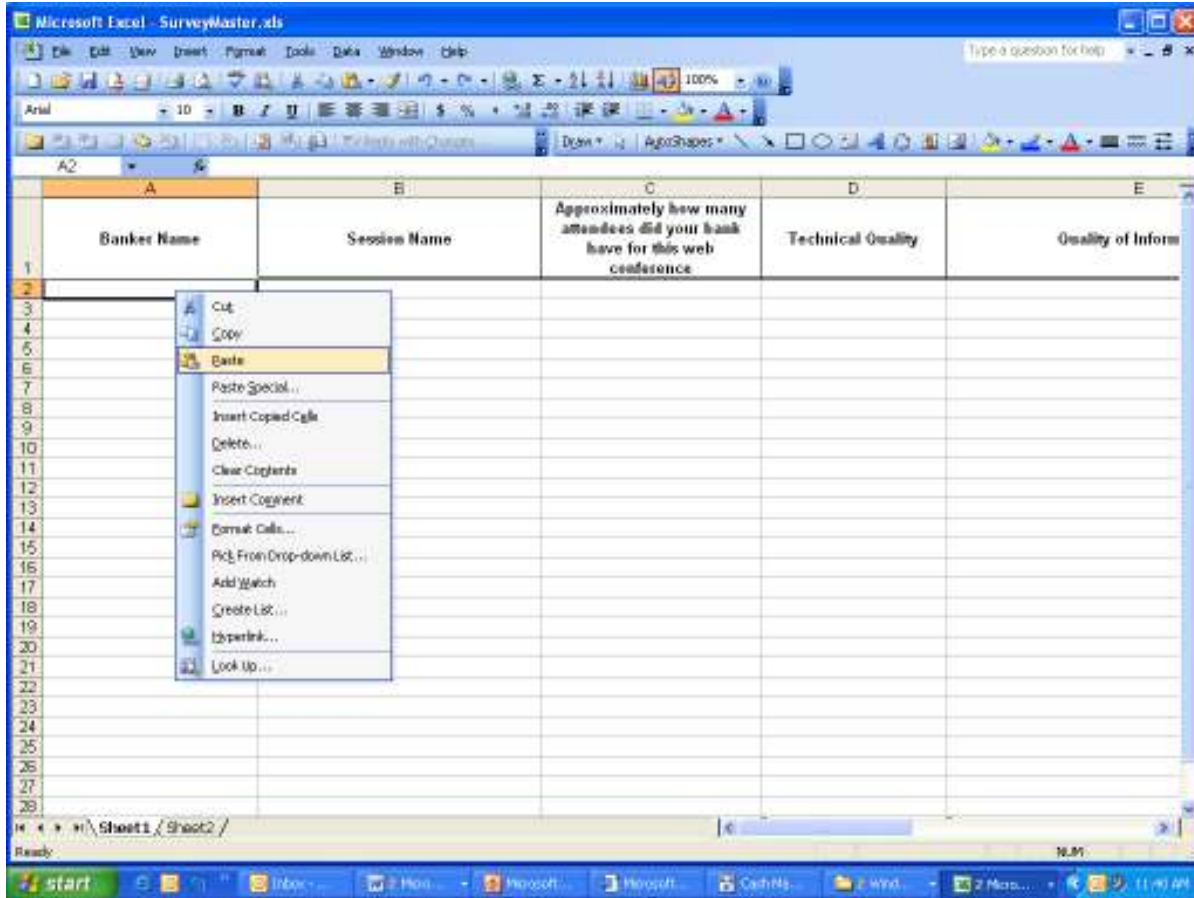
Minimize this screen.



Pull up the Metavante Survey Results.xls

Highlight the most current survey results, right-click your mouse, click COPY.

Minimize this screen.



Pull up the SurveyMaster.xls

Click the A2 cell, right-click your mouse, click PASTE.

The screenshot shows a Microsoft Excel spreadsheet titled "SurveyMaster.xls". The spreadsheet contains a table with the following data:

	A	B	C	D	E
	Banker Name	Session Name	Approximately how many attendees did your bank have for this web conference	Technical Quality	Quality of Inform
1					
2	Krista Fulmer	What you dont know about your documer	1-1	5	5
3	Krista Fulmer	What you dont know about your documer	1-1	5	5
4	Chad Foreman	What you dont know about your documer	1-1	4	4
5	Shelly Taro	What You Don't Know About Your Docum	1-1	5	5
6	carla boulineau	documents part 2	2-4	4	4
7	donna columbus	bank documents	1-1	3	3
8	Jackie Jones	Your Documents Part 2	1-1	4	4
9					
10					
11					
12					
13					
14					
15					
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28					

You now have the correct information.

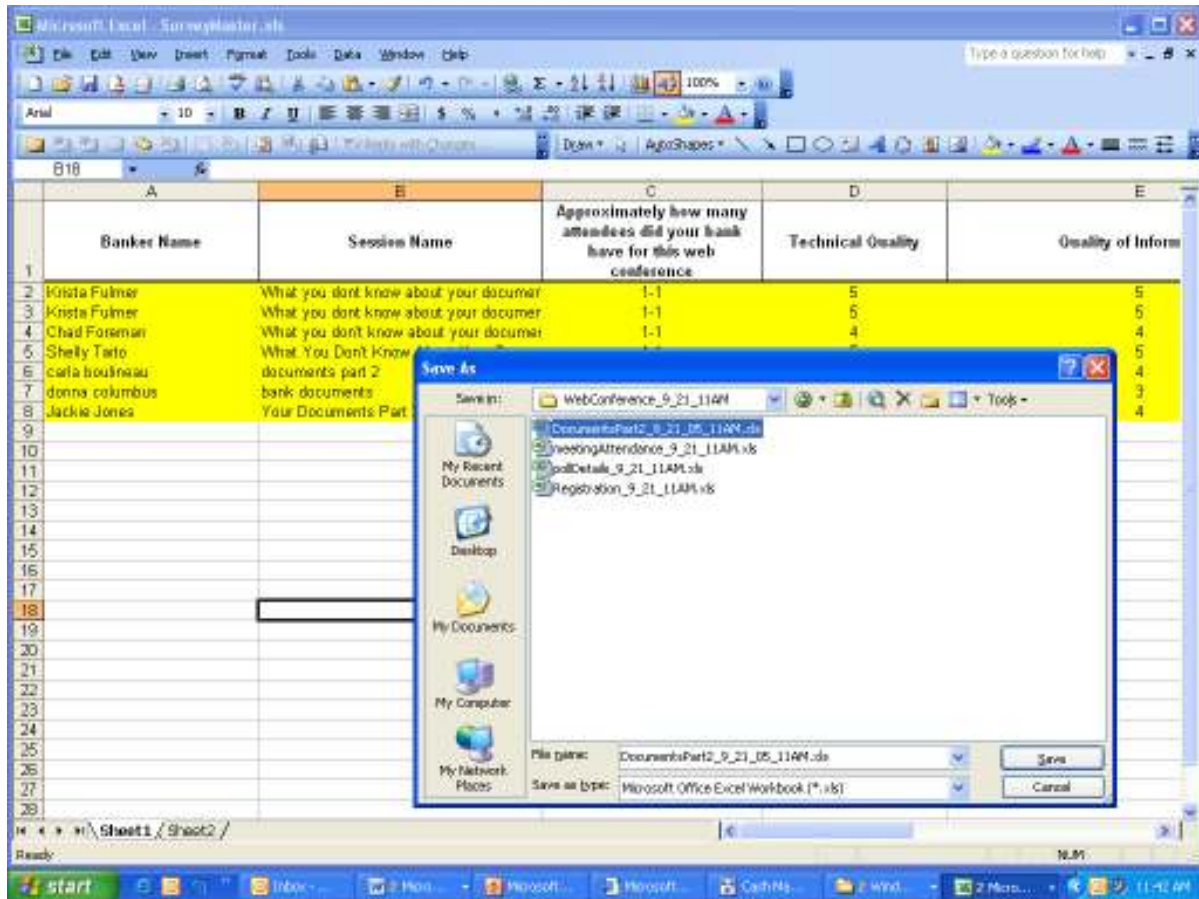


The screenshot shows a Microsoft Excel spreadsheet titled "SurveyMaster.xls". The spreadsheet contains a table with the following data:

	B	C	D	E	
	Banker Name	Session Name	Approximately how many attendees did your bank have for this web conference	Technical Quality	Quality of Inform
1					
2	Krista Fulmer	What you dont know about your documer	1-1	5	5
3	Krista Fulmer	What you dont know about your documer	1-1	5	5
4	Chad Foreman	What you dont know about your documer	1-1	4	4
5	Shelly Taro	What You Don't Know About Your Docum	1-1	5	5
6	carla boufneau	documents part 2	2-4	4	4
7	donna columbus	bank documents	1-1	3	3
8	Jackie Jones	Your Documents Part 2	1-1	4	4
9					
10					
11					
12					
13					
14					
15					
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28					

Click FILE.

SAVE AS.



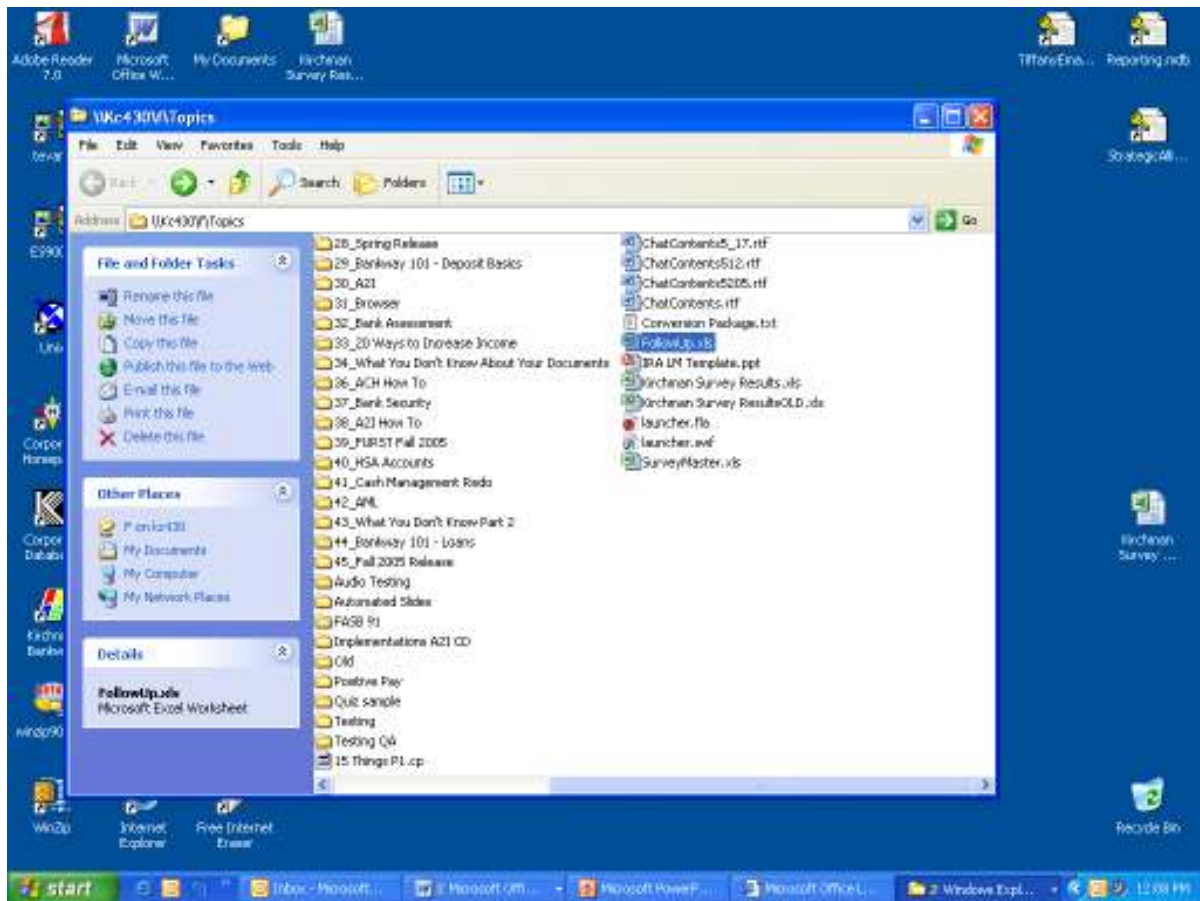
Save this under the appropriate folder:

As of 9/22/05, the correct path is Barry's F drive, Topics, the Session Folder, `WebConference_mm_dd_TimeOfDay`

Name the file:

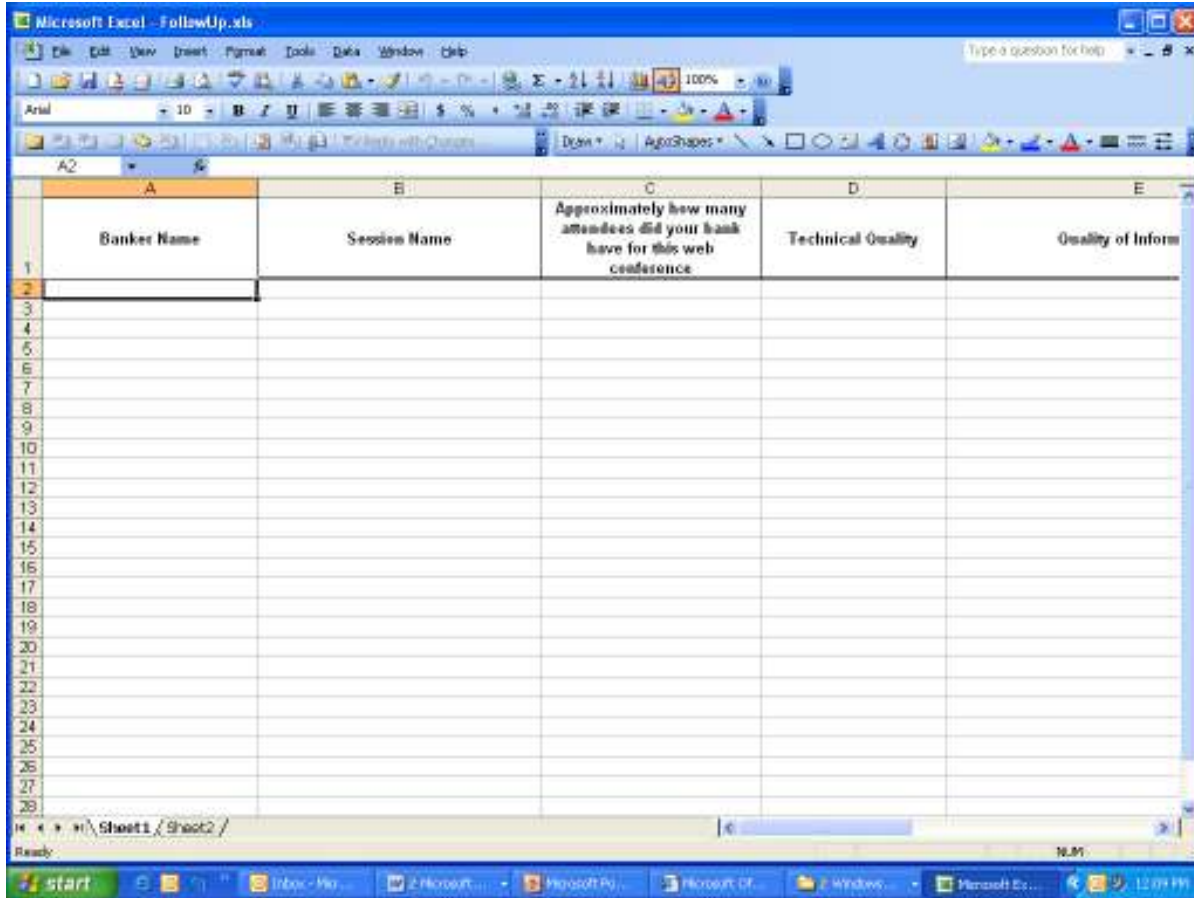
`WebConferenceName_mm_dd_TimeOfDay`

End of Procedure unless you have YES in the Follow Up field. If you do, continue reading.



Go to [\Wks430f\Topics](#)

Open FollowUp.xls

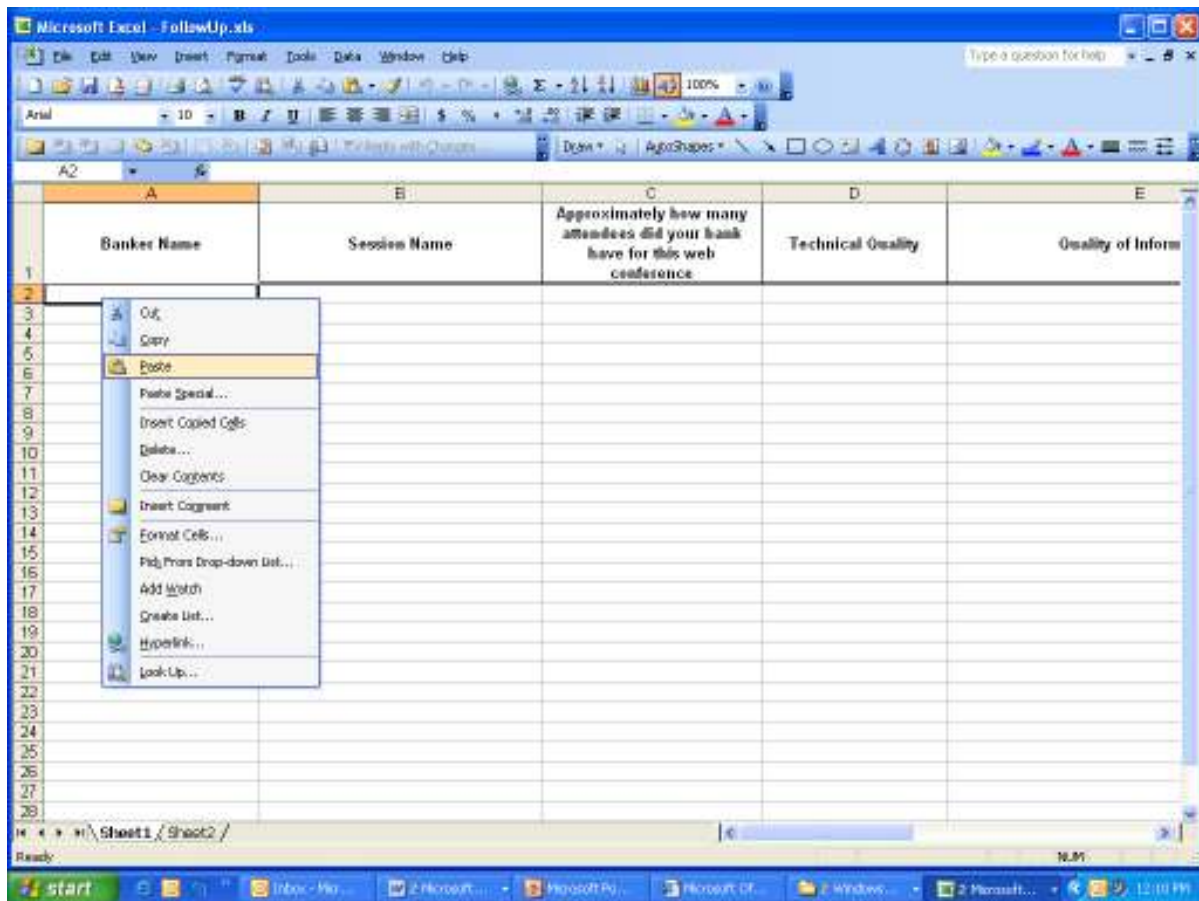


Minimize this screen.

	A	B	C	D	E
	Banker Name	Session Name	Approximately how many attendees did your bank have for this web conference	Technical Quality	Quality of Inform
2	Ann Worthington	Dash Management	1-1	4	4
3	C&C Bank	Cash Management	2-4	3	3
4	CU	Cash management	1-1	4	5
5	CU	Cash Management	1-1	4	4
6	CU	Cash Management Overview	5-8	3	2
7	CU	cash mgmt	2-4	5	5
8	CU	Cash Management	2-4	2	2
9	CU	cash management	1-1	4	4
10	CU	Cash Management	1-1	3	4
11	CU	Cash Management	5-8	3	3
12	CU	Cash Management	2-4	5	5
13	CU	Cash Management	2-4	4	3
14	CU	Cash Management	1-1	4	4
15	CU	Cash Management	1-1	4	5
16	CU	Cash Mgmt	1-1	5	5
17	CU	Cash Mgmt	2-4	3	4
18	CU	Cash Mgmt	1-1	4	4
19	CU	Cash Mgmt Web Conf	2-4	3	3
20	Theresa -Gaffney	Cash Management	1-1	4	4
21	Verdella	Cash Management	1-1	4	5
22	N/A	Cash Management	5-8	5	5
23	N/A	Cash Management	2-4	5	5
24					
25					
26				3.9	4.0
27					
28					

Pull up the survey results from the survey.

Highlight all data, right-click your mouse, COPY.



Pull up FollowUp.xls

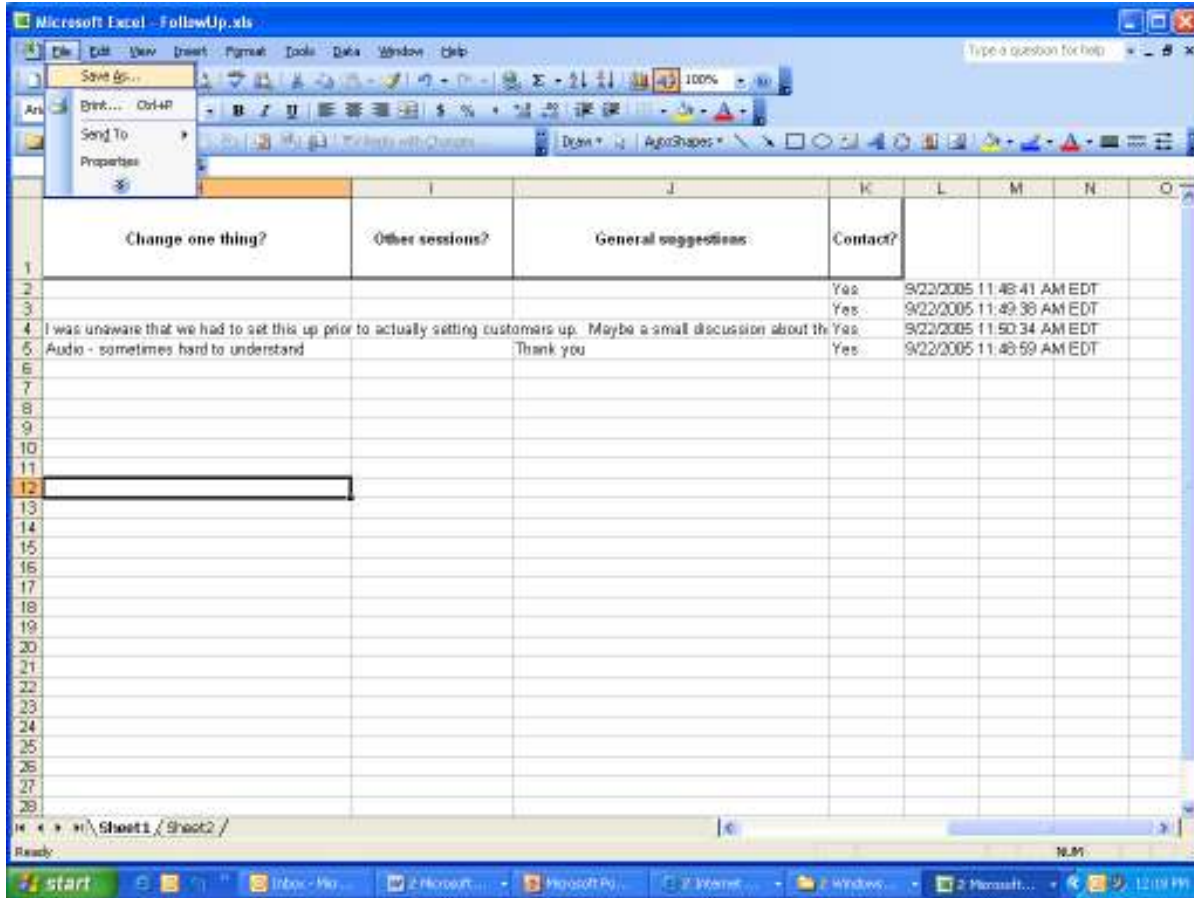
Click the A2 cell, right-click your mouse, PASTE.

The screenshot shows a Microsoft Excel spreadsheet titled 'FollowUp.xls'. The spreadsheet has four main columns: 'Change one thing?', 'Other sessions?', 'General suggestions', and 'Contact?'. The 'Contact?' column contains 'Yes' or 'No' responses. The right side of the spreadsheet shows a timestamp for each row, such as '9/22/2005 11:49:50 AM EDT'. The 'Contact?' column for row 24 is highlighted in orange.

	H	I	J	K	L	M	N
	Change one thing?	Other sessions?	General suggestions	Contact?			
1							
2				No	9/22/2005 11:49:50 AM EDT		
3				No	9/22/2005 11:49:52 AM EDT		
4				No	9/22/2005 11:50:23 AM EDT		
5				No	9/22/2005 11:49:52 AM EDT		
6				No	9/22/2005 11:49:03 AM EDT		
7				No	9/22/2005 11:49:16 AM EDT		
8				Yes	9/22/2005 11:48:41 AM EDT		
9				No	9/22/2005 11:48:39 AM EDT		
10				No	9/22/2005 11:48:53 AM EDT		
11	Live Q & A			No	9/22/2005 11:50:29 AM EDT		
12				No	9/22/2005 11:50:08 AM EDT		
13	Slow down on the presentation			No	9/22/2005 11:49:12 AM EDT		
14				Yes	9/22/2005 11:49:38 AM EDT		
15	I was unaware that we had to set this up prior to actually setting customers up. Maybe a small discussion about th			Yes	9/22/2005 11:50:34 AM EDT		
16				No	9/22/2005 11:49:01 AM EDT		
17				No	9/22/2005 11:50:42 AM EDT		
18		Account Analysis			9/22/2005 11:50:34 AM EDT		
19				No	9/22/2005 11:48:50 AM EDT		
20				No	9/22/2005 11:49:30 AM EDT		
21	Audio - sometimes hard to understand		Thank you	Yes	9/22/2005 11:48:59 AM EDT		
22				No	9/22/2005 11:49:18 AM EDT		
23				No	9/22/2005 11:49:35 AM EDT		
24					9/22/2005 11:50:28 AM EDT		
25							
26							
27							
28							

Scroll over to the Contact? Field.

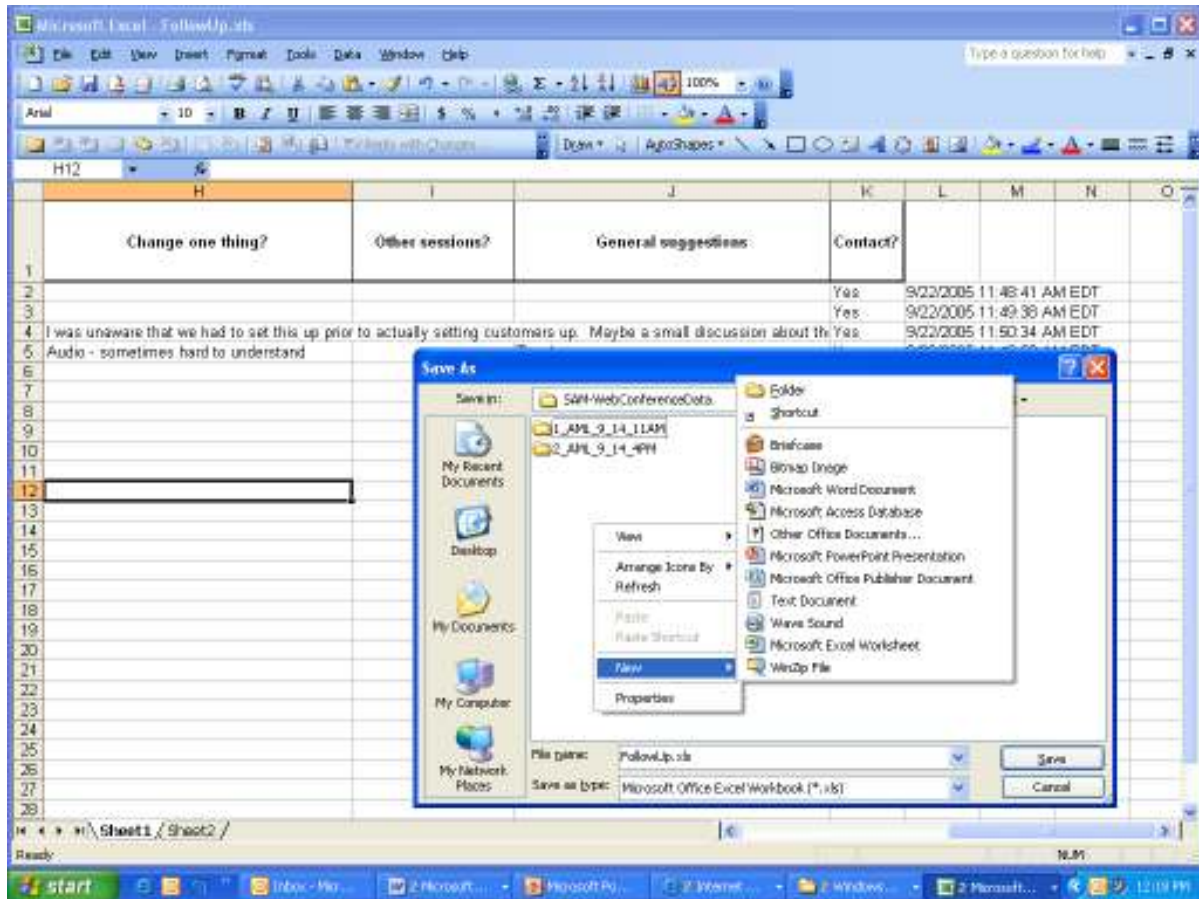
Delete customers who do not want to be contacted.



Go to FILE.

SAVE AS.

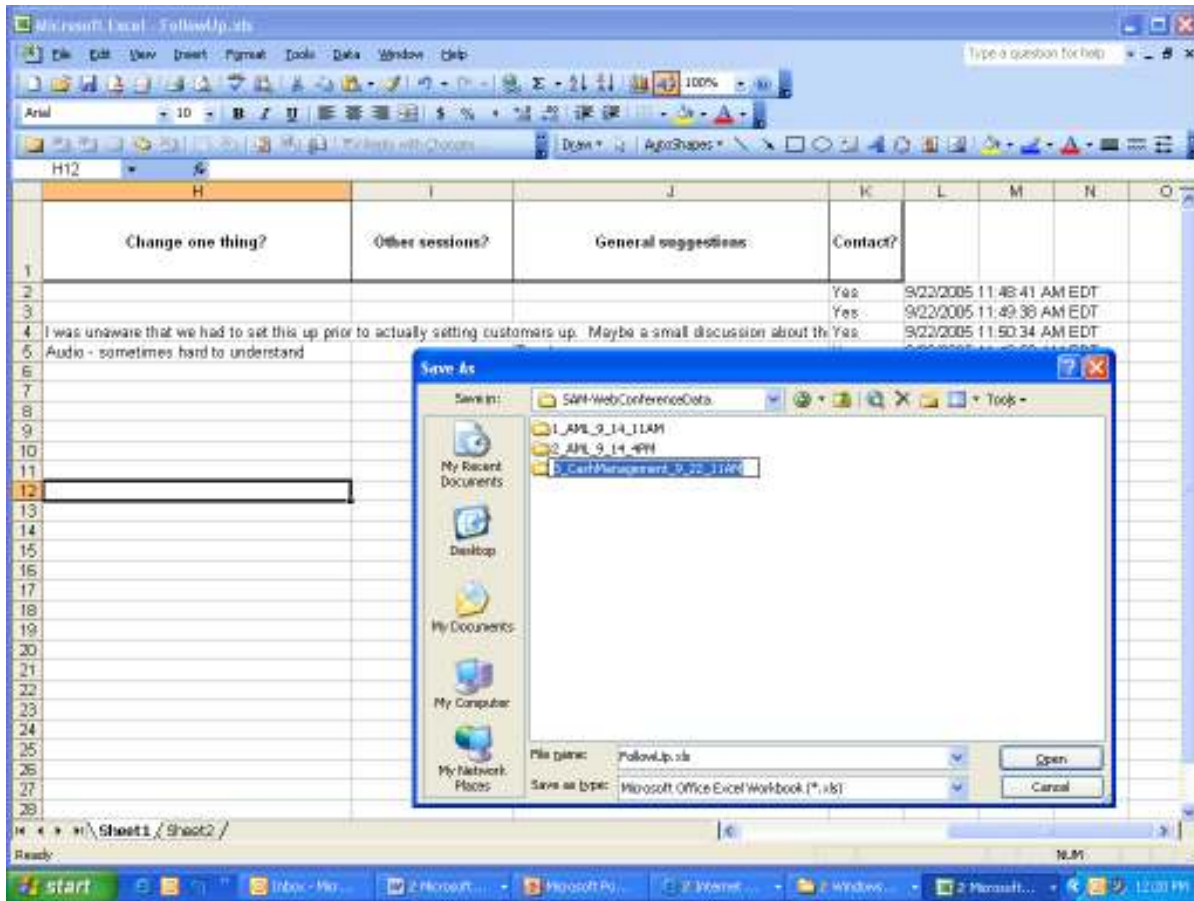




Go to

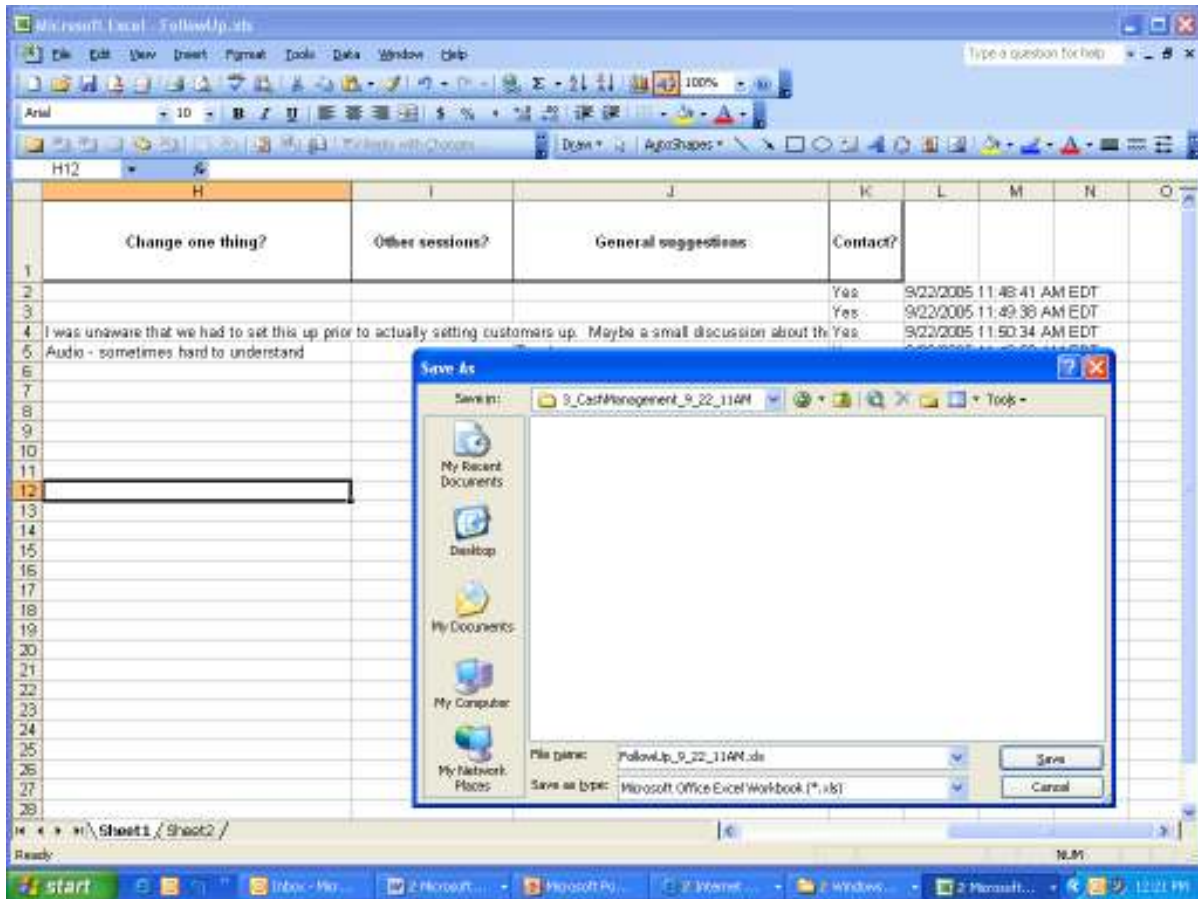
Dus public\SAM-WebConferenceData

Right-click in the white box and click NEW – FOLDER



Name the folder....

TheNextNumber\_SessionName\_mm\_dd\_TimeOfDay



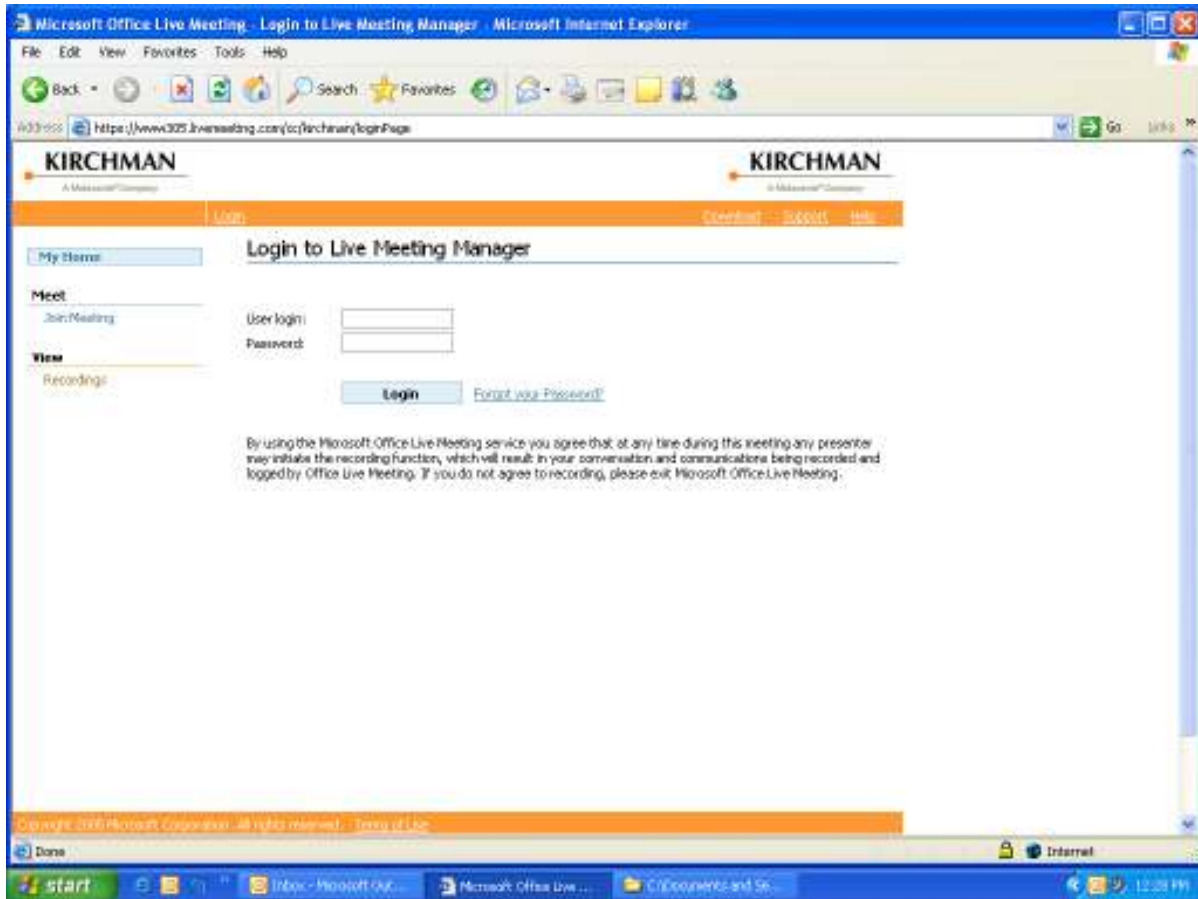
Open the new folder you created.

Save the file as:

FollowUp\_mm\_dd\_TimeOfDay.xls

Send an email to all Strategic Account Managers with a link to that folder and ask them to contact the banker within 48 hours.

## Capturing Poll Data



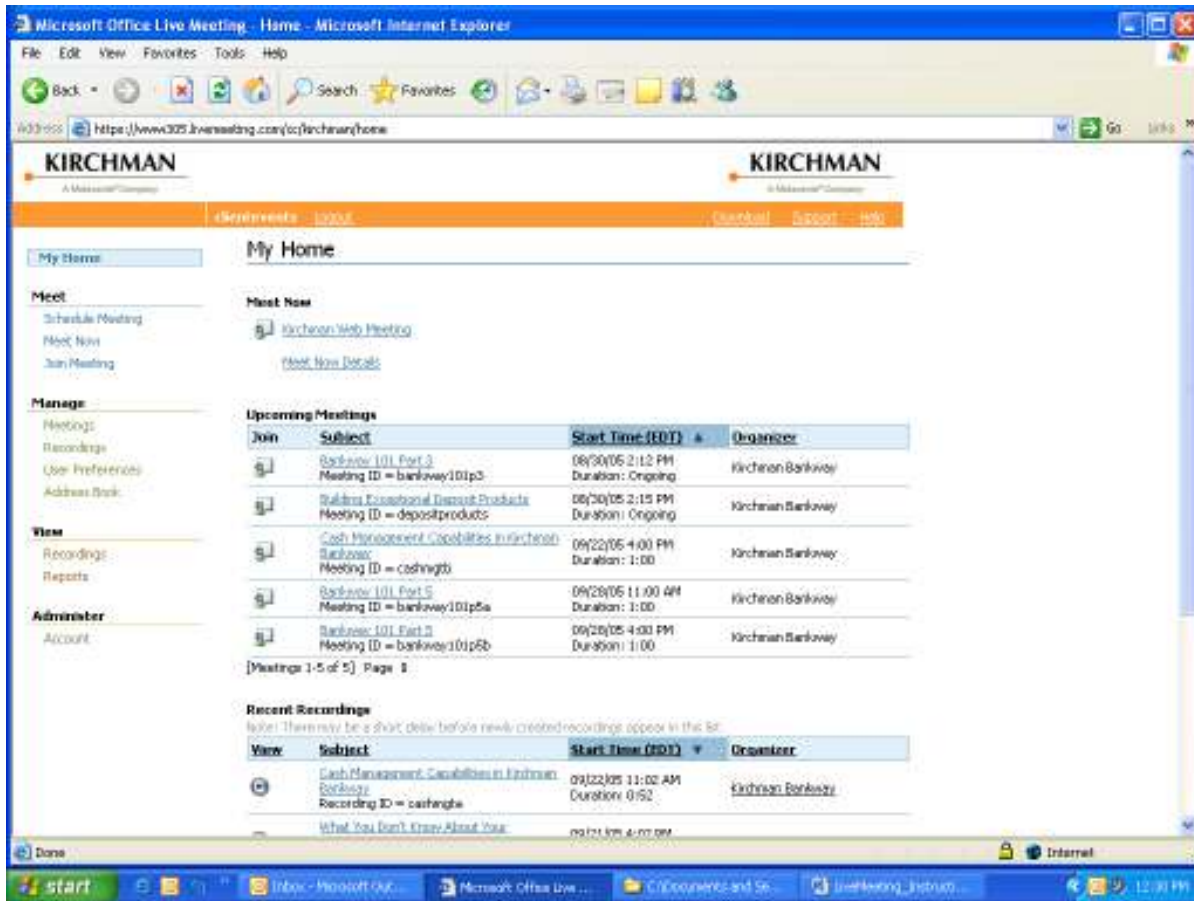
Go to:

<https://www305.livemeeting.com/cc/Metavante/loginPage>

Enter the User Login and Password.

User Login	clientevents
Password	clientevents

Click LOGIN



Click REPORTS.

Microsoft Office Live Meeting - View Reports - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites

Address: https://www3025.livemeeting.com/oc/\_AR/kirchman/ar/viewReports

**KIRCHMAN**  
A Microsoft® Company

Home Events Logout Account Support Help

My Name: Summary Report Meeting List Recording List Meeting Trends Recording Trends Member List

### View Reports

**To generate the following reports, you must have administrator privileges:**

- Summary:** Provides a review of server use for the day, week, month, and year listing the number of meetings, attendance, connection hours, and recordings. From the report you can determine peak usage and plan your license capacity.
- Meeting Trends:** Includes information about server usage and trends.
- Recording Trends:** Lists trends in server usage for viewed recordings.
- Member List:** Provides a summary of member activity indicating the number of meetings and recordings that each person has currently scheduled or deleted.

**To generate the following reports, you must have organizer or administrator privileges:**

- Meeting List:** Lists the meetings and attendance for a given time period.
- Recording List:** Shows the recordings available for a given time period and the number of times each one was viewed.

Copyright © 2005 Microsoft Corporation. All rights reserved. Terms of Use

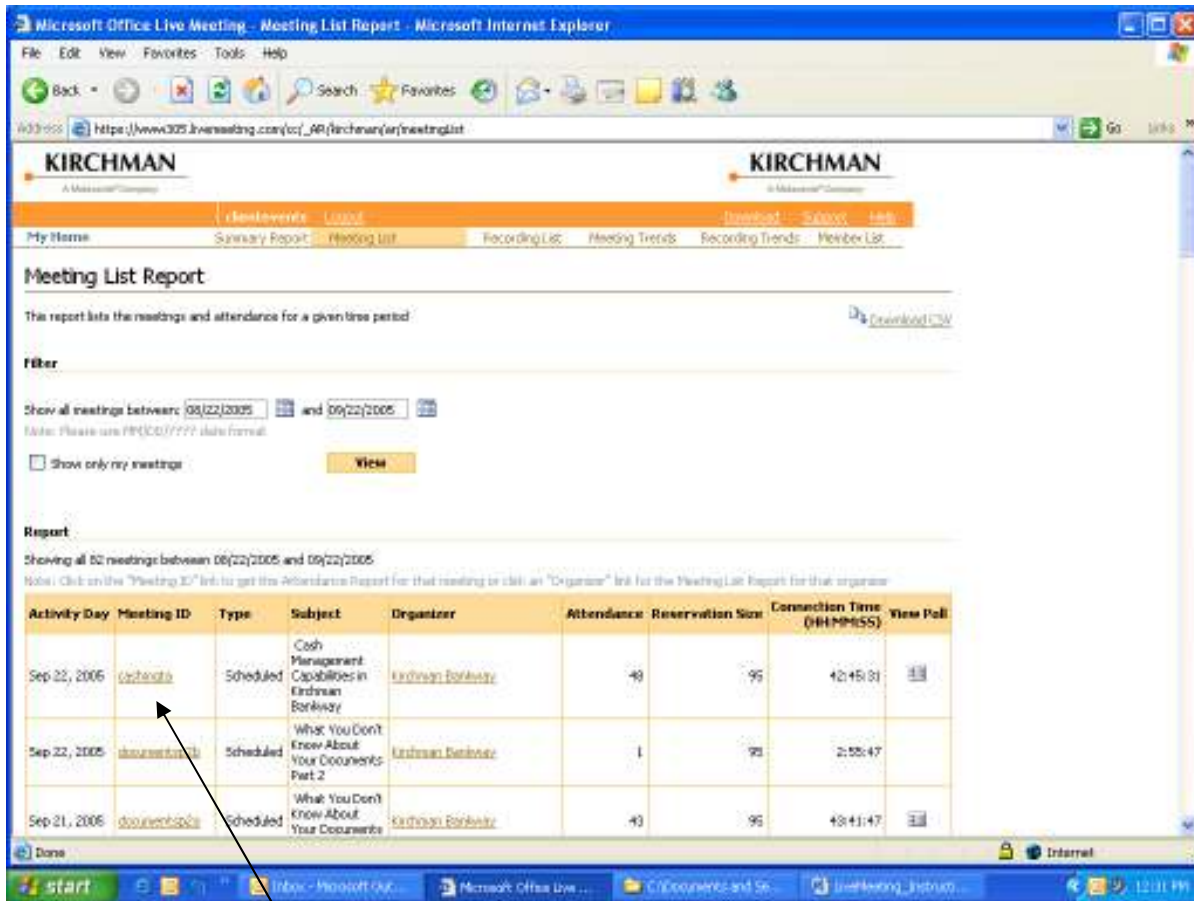
All information submitted will be subject to the Office Live Meeting - Microsoft Terms of Use

[Bankway Education Registration Page](#) [VHS Event Registration](#) [Kirchman Event Registration Login](#)

Powered by **Live Meeting**

start | Internet | 12:01 PM

Click Meeting List.



Find the Web Conference you are capturing information about and click the name under "Meeting ID".

The screenshot displays a web browser window titled "Microsoft Office Live Meeting - Meeting Attendance Report". The page header includes the "KIRCHMAN" logo and navigation links for "Home", "Account", "Support", and "Help". Below the header, there are tabs for "My Home", "Summary Report", "Meeting List", "Recording List", "Meeting Trends", "Recording Trends", and "Member List".

The main content area is titled "Meeting Attendance Report" and contains the following information:

This report shows the attendance for all occurrences of a meeting, based on arrival times and activity day.

[Download CSV](#)

Meeting Summary		<a href="#">Full Detail Report</a>	<a href="#">Meeting List Report</a>
Meeting ID:	cashmg14	Subject:	Cash Management Capabilities in Kirchman Bankway
Schedule Start Date and Time:	09/22/2005 11:00 AM	Schedule Duration (mins):	60
Organizer:	Kirchman Bankway	Bill to:	Client Events
Reservation Size:	95	Maximum Simultaneous Connections:	44

Meeting Attendance Details

Activity Day	Name	Role	Arrived	Duration (HH:MM:SS)	IP Address	Company	Browser
Sep 22, 2005	<a href="#">Andy CESTR</a>	Attendee	09/22/2005 10:59 AM	0:56:27	24.149.30.2	bankiowa	Mozilla/4.0 (compatible; MSIE 6.0; Windows NT 5.0)
Sep 22, 2005	<a href="#">Andy BROAD</a>	Attendee	09/22/2005 11:50 AM	0:04:46	205.238.240.34	Integrity Bank	Mozilla/4.0 (compatible; MSIE 6.0; Windows NT 5.1; SV1; .NET CLR 1.1.43822)
Sep 22, 2005	<a href="#">Brandon TCB</a>	Attendee	09/22/2005 11:00 AM	0:54:00	12.159.163.67	The Columbia Bank	Mozilla/4.0 (compatible; MSIE 6.0; Windows NT 5.0)

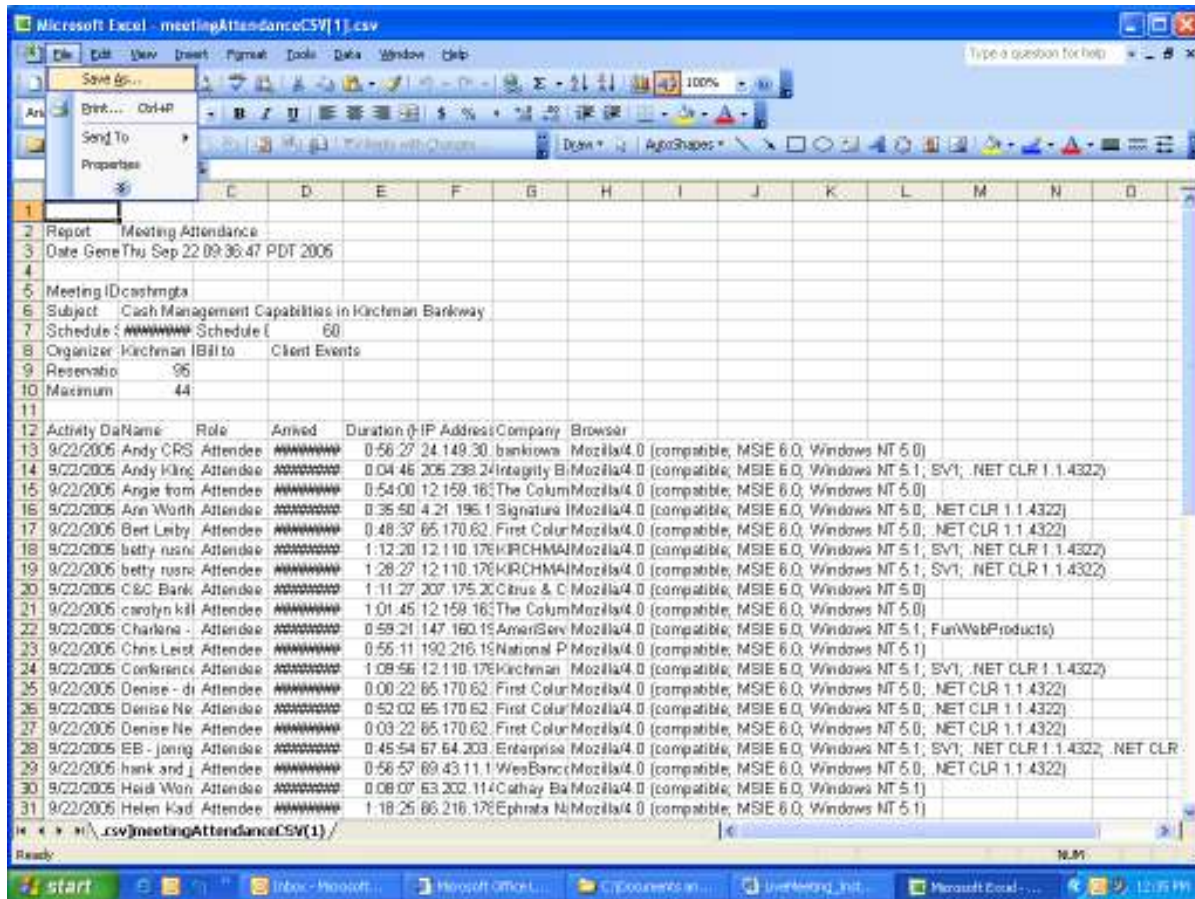
Click Download CSV to download the meeting attendance.



The screenshot displays a web browser window showing a 'Meeting Attendance Report' for a meeting on Sep 22, 2005. A 'File Download' dialog box is overlaid on the page, asking the user to 'Do you want to open or save this file?' for a file named 'meetingAttendanceCSV.csv'. The dialog box also displays the file type as 'Microsoft Office Excel Comma Separated Values File' and the source as 'www305.livemeeting.com'. Below the dialog box, a table lists the meeting attendees:

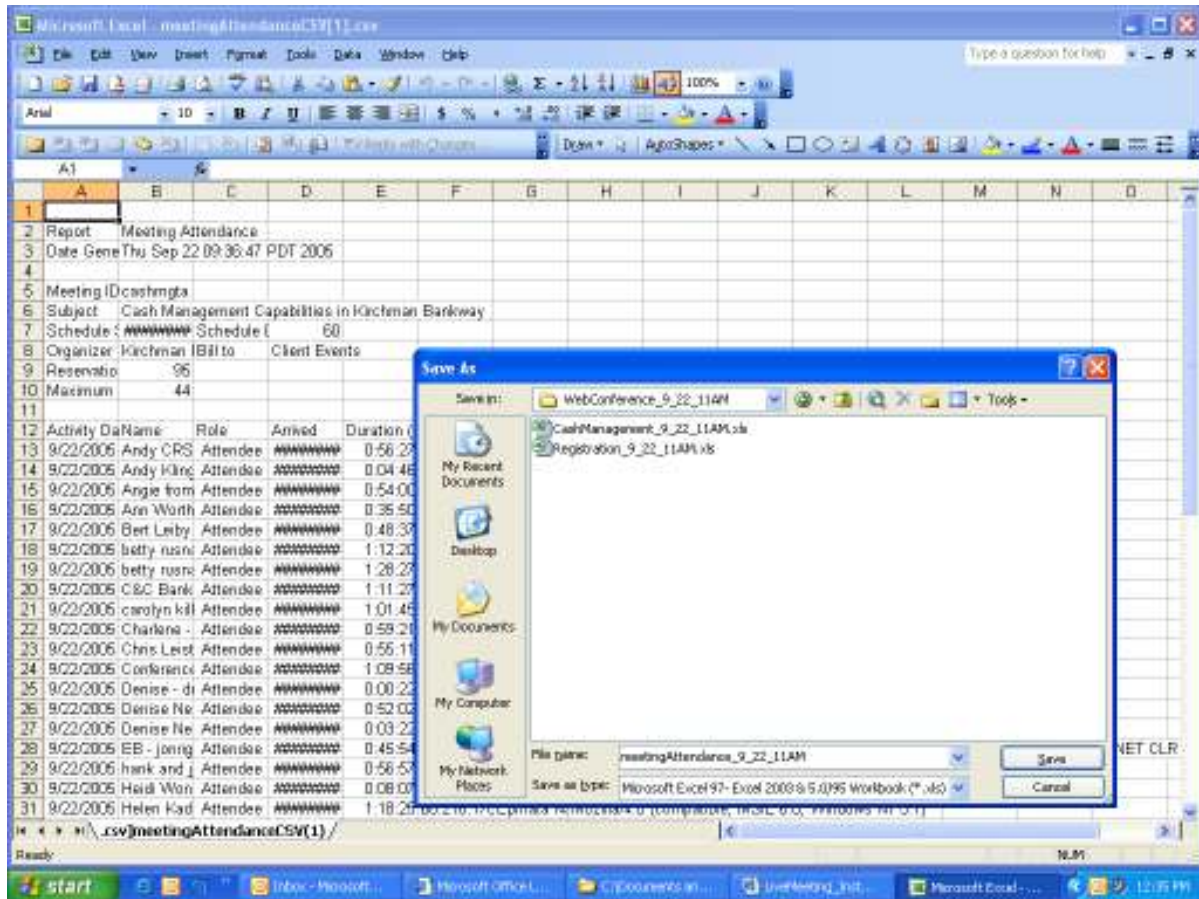
Activity Day	Name	Role	Arrived	(IP address)	IP Address	Company	Browser
Sep 22, 2005	Andy C... C...@...com	Attendee	09/22/2005 10:59 AM	0.56:27	24.149.30.2	bankows	Mozilla/4.0 (compatible; MSIE 6.0; Windows NT 5.0)
Sep 22, 2005	Andy B... B...@...com	Attendee	09/22/2005 11:50 AM	0.04:46	205.238.240.34	Integrity Bank	Mozilla/4.0 (compatible; MSIE 6.0; Windows NT 5.1; SV1; .NET CLR 1.1.4322)
Sep 22, 2005	Brandon T... T...@...com	Attendee	09/22/2005 11:00 AM	0.54:00	12.159.163.67	The Columbia Bank	Mozilla/4.0 (compatible; MSIE 6.0; Windows NT 5.0)

Click OPEN.



Click FILE.

SAVE AS.



Save this under the appropriate folder:

As of 9/22/05, the correct path is Barry's F drive, Topics, the Session Folder, WebConference\_mm\_dd\_TimeOfDay

Name the file:

meetingattendance\_mm\_dd\_TimeOfDay

Change the "Save as Type" to Microsoft Excel

The screenshot shows a web browser window displaying a 'Meeting Attendance Report' for a meeting titled 'Cash Management Capabilities in Kirchman Bankway'. The report is generated by Kirchman. It includes a summary table and a detailed attendance table.

**Meeting Summary**

Meeting ID	cashmg16	Subject	Cash Management Capabilities in Kirchman Bankway
Schedule Start Date and Time	09/22/2005 11:00 AM	Schedule Duration (mins)	60
Organizer	Kirchman Bankway	Bill to	Client Events
Reservation Size	95	Maximum Simultaneous Connections	44

**Meeting Attendance Details**

Activity Day	Name	Role	Arrived	Duration (HH:MM:SS)	IP Address	Company	Browser
Sep 22, 2005	Andy C...@B...com	Attendee	09/22/2005 10:59 AM	0:56:27	24.149.30.2	bankows	Mozilla/4.0 (compatible; MSIE 6.0; Windows NT 5.0)
Sep 22, 2005	Andy B...@I...com	Attendee	09/22/2005 11:50 AM	0:04:46	205.238.240.34	Integrity Bank	Mozilla/4.0 (compatible; MSIE 6.0; Windows NT 5.1; SV1; .NET CLR 1.1.4322)
Sep 22, 2005	Brandon T...@C...com	Attendee	09/22/2005 11:00 AM	0:54:00	12.159.163.67	The Columbia Bank	Mozilla/4.0 (compatible; MSIE 6.0; Windows NT 5.0)

Click POLL DETAILS REPORT to download the poll results from this session.

The screenshot shows a web browser window displaying a 'Meeting Poll Report' from KIRCHMAN. The report includes a summary table and a detailed poll results table. An arrow points to a 'Download CSV' link in the top right corner of the report area.

**Meeting Summary**

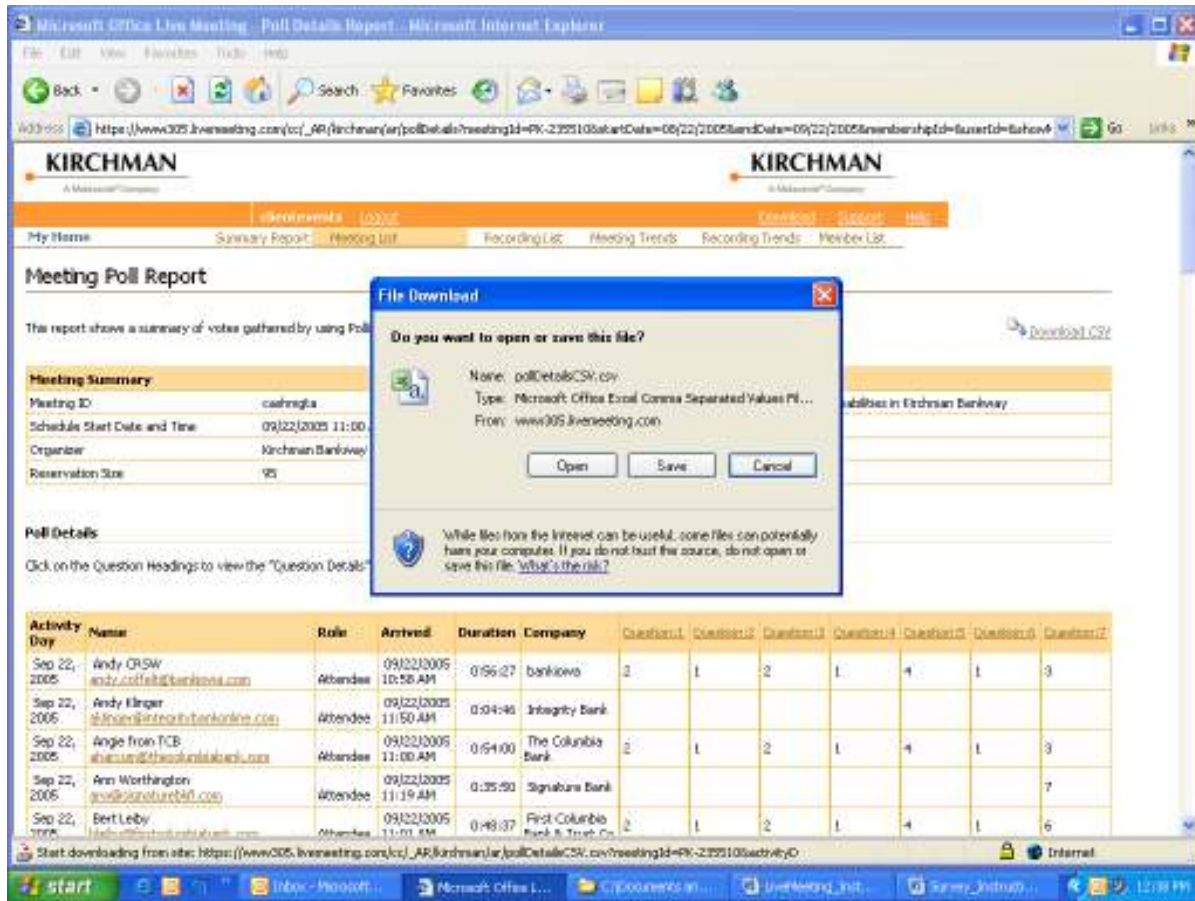
Meeting ID	cashmgla	Meeting Attendance Report	Meeting List Report
Schedule Start Date and Time	09/22/2005 11:00 AM	Schedule Duration (Minutes)	60
Organizer	Kirchman Bankway	Bill To	Client Events
Reservation Size	95	Maximum Simultaneous Connections	44

**Poll Details**

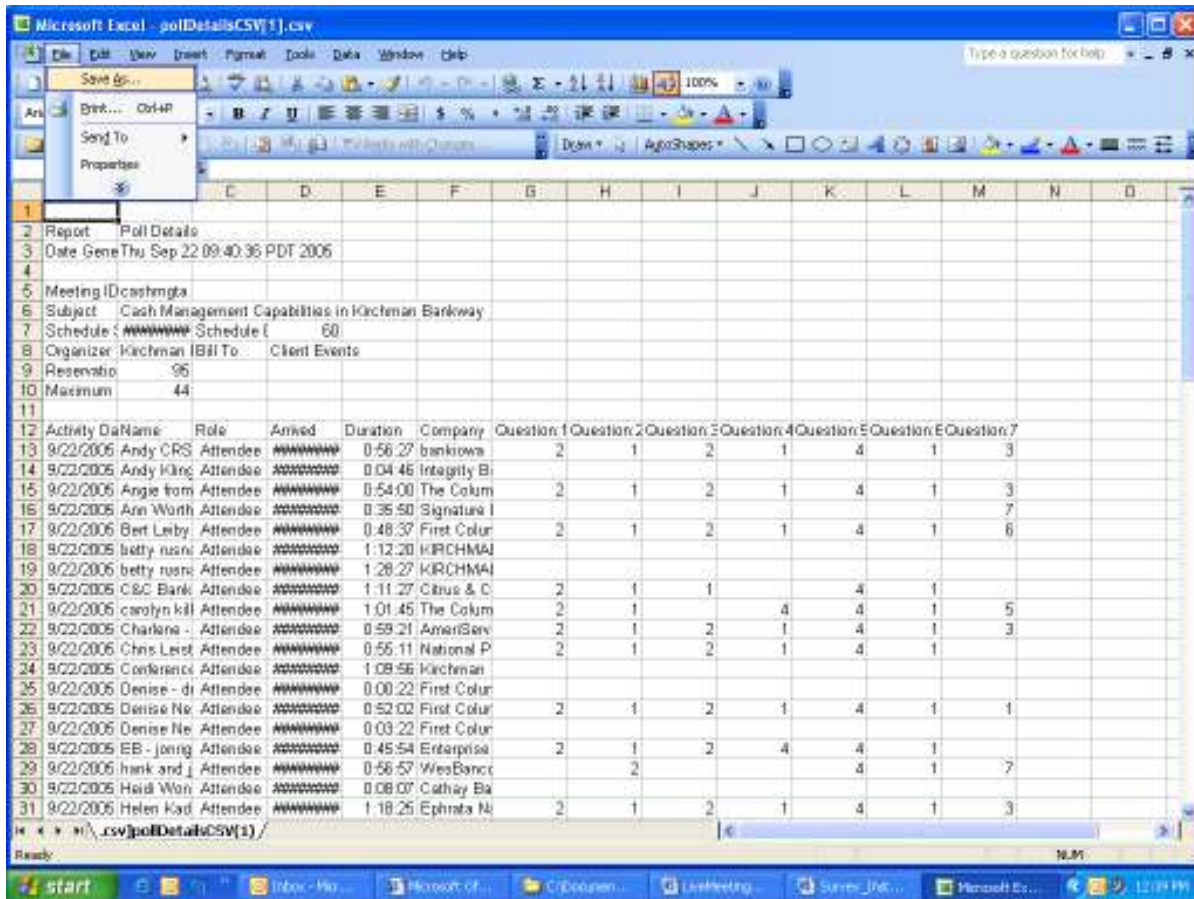
Click on the Question Headings to view the "Question Details".

Activity Day	Name	Role	Arrived	Duration	Company	Question 1	Question 2	Question 3	Question 4	Question 5	Question 6	Question 7
Sep 22, 2005	Andy ORSW <a href="mailto:andy.orsw@bankway.com">andy.orsw@bankway.com</a>	Attendee	09/22/2005 10:56 AM	0:56:27	bankway	2	1	2	1	4	1	3
Sep 22, 2005	Andy Klingler <a href="mailto:akling@signaturebank.com">akling@signaturebank.com</a>	Attendee	09/22/2005 11:50 AM	0:04:46	Signature Bank							
Sep 22, 2005	Angie from TCB <a href="mailto:angieus@thecolumbiabank.com">angieus@thecolumbiabank.com</a>	Attendee	09/22/2005 11:00 AM	0:54:00	The Columbia Bank	2	1	2	1	4	1	3
Sep 22, 2005	Ann Worthington <a href="mailto:awor@signaturebank.com">awor@signaturebank.com</a>	Attendee	09/22/2005 11:34 AM	0:35:50	Signature Bank							7
Sep 22, 2005	Bert Leby <a href="mailto:leby@firstcolumbiabank.com">leby@firstcolumbiabank.com</a>	Attendee	09/22/2005 11:01 AM	0:48:37	First Columbia Bank & Trust Co.	2	1	2	1	4	1	6

Click Download CSV.

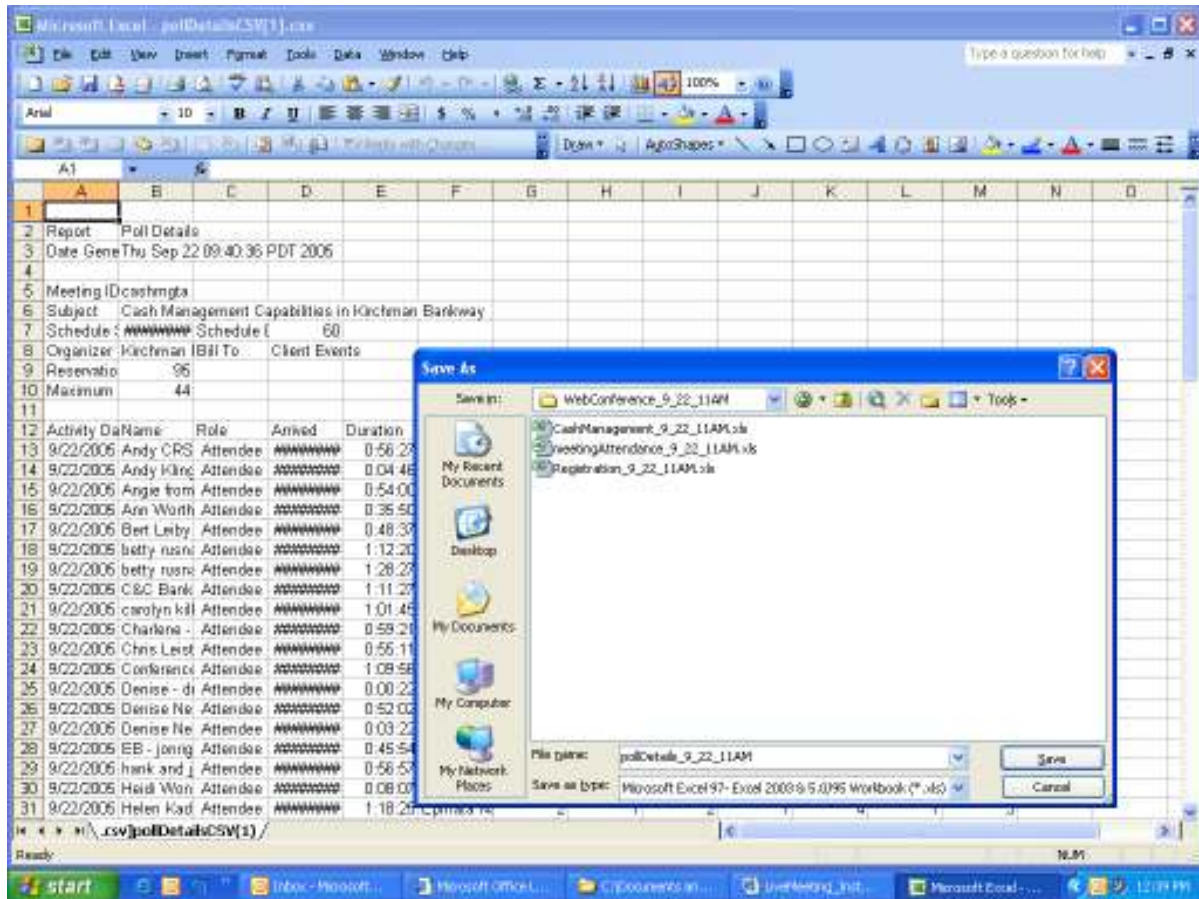


Click OPEN.



Click FILE.

SAVE AS.



Save this under the appropriate folder:

As of 9/22/05, the correct path is Barry's F drive, Topics, the Session Folder, WebConference\_mm\_dd\_TimeOfDay

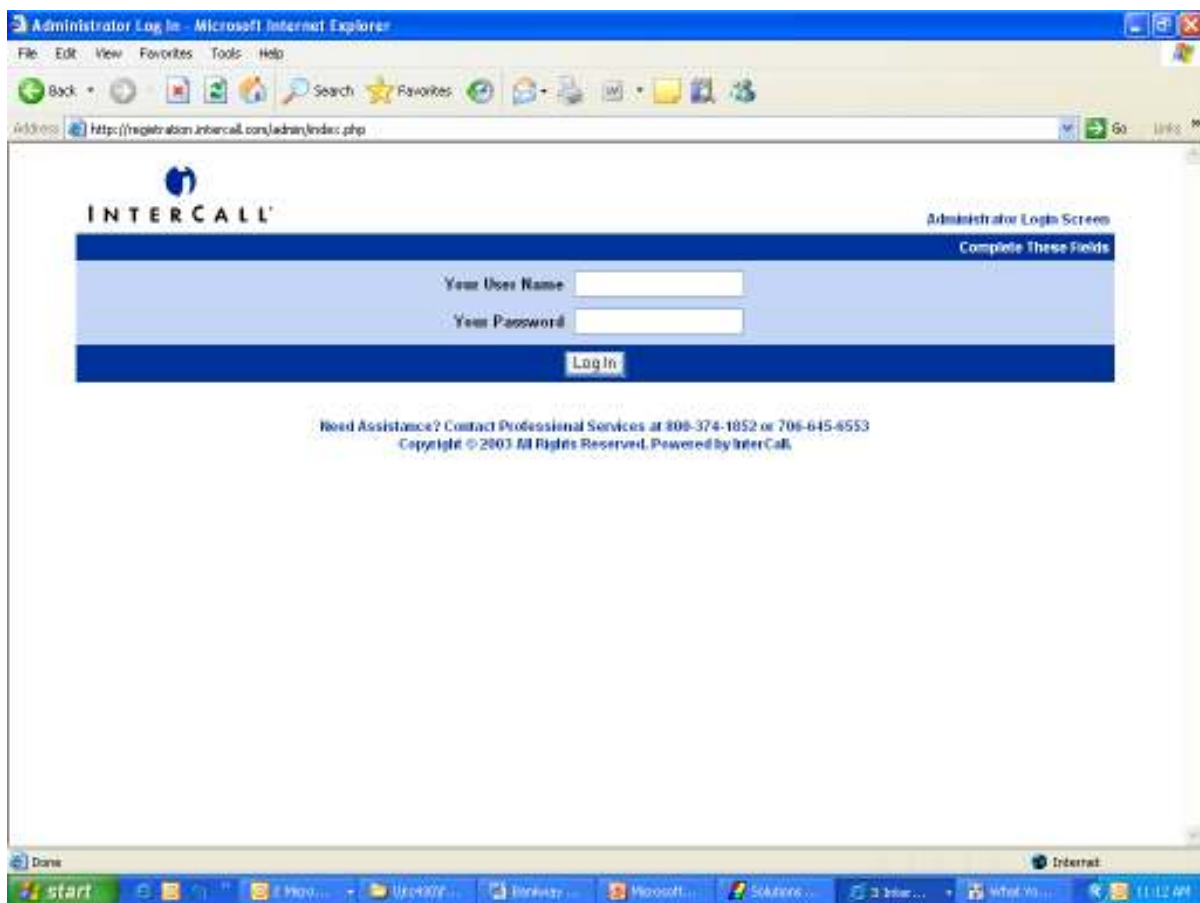
Name the file:

pollDetails\_mm\_dd\_TimeOfDay

Change the "Save as Type" to Microsoft Excel



## Saving Registration List Data

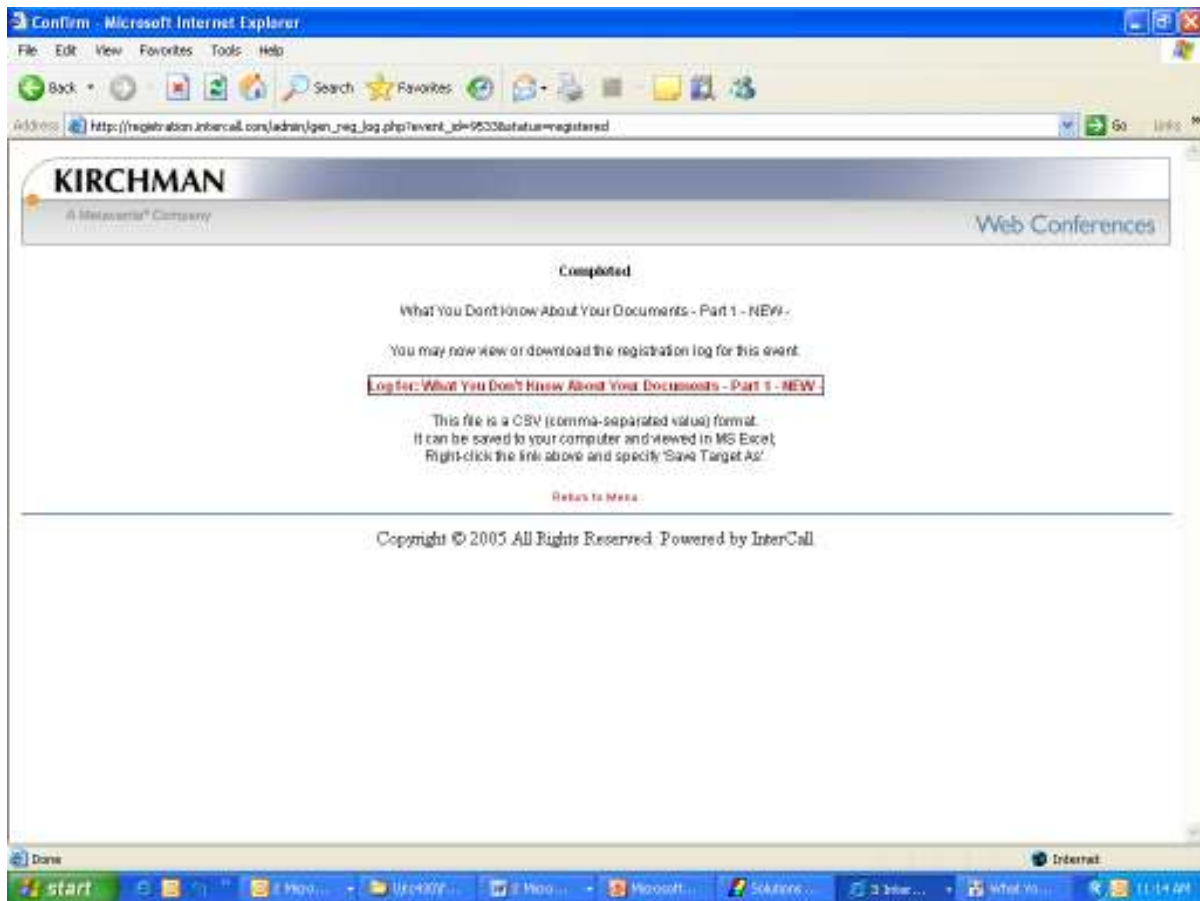


Sign in to InterCall's Registration System.

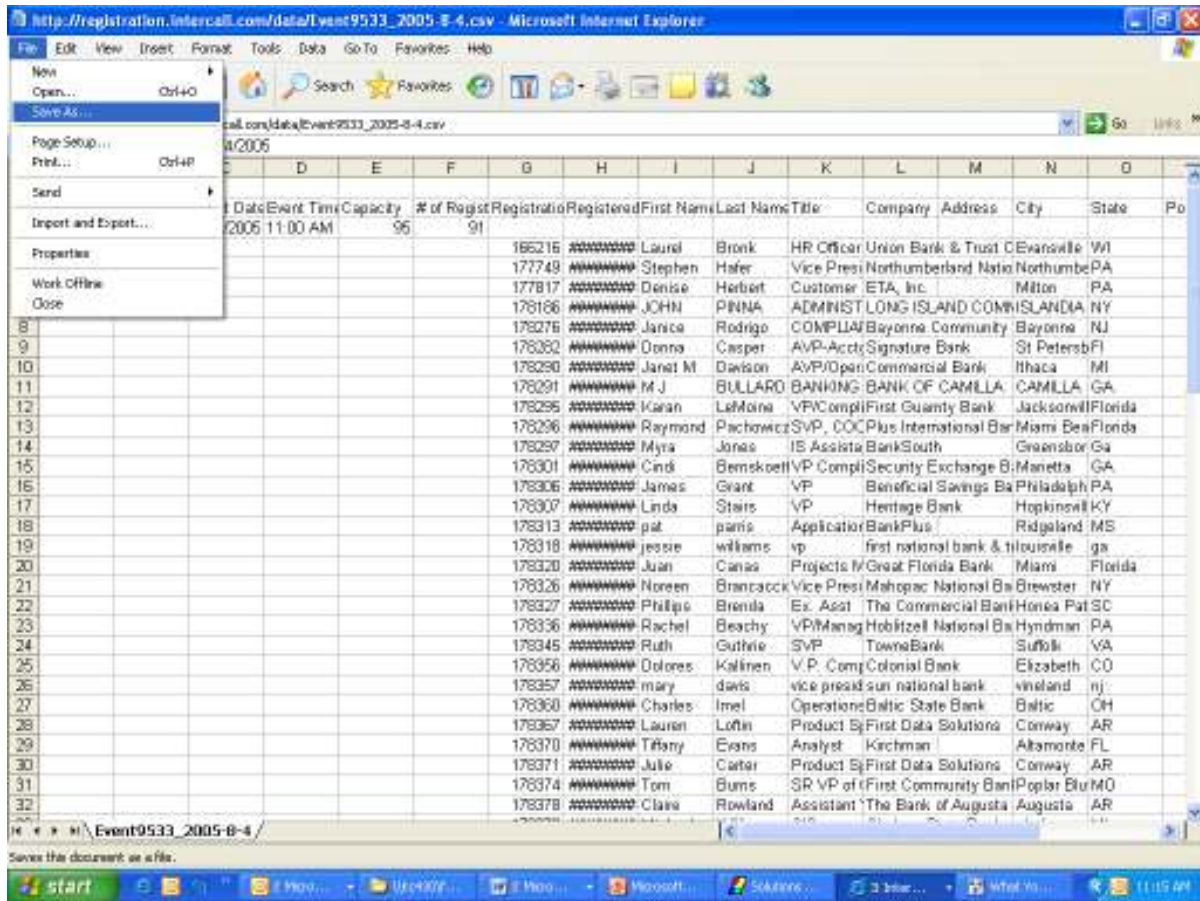
The screenshot shows the Kirchman Web Conferences administrator interface. The browser window title is "Administrator News - Microsoft Internet Explorer". The address bar shows "http://registration.inbarcall.com/admin/events.php". The page header includes the Kirchman logo and "Web Conferences". The main content area is titled "Perform an Action on an Existing Event:" and contains a table of events. The event "Online Strategies for Retention & Wallet" is highlighted in blue. Below the table are several buttons: "Edit Event Details", "Delete Event", "Link Address", "Registered", and "View Logs".

Event Name	Date	Time	Timezone	Status
Bankway 101 (Part 3 of 5) - Management I	2005-07-21	16:00	EDT	closed
20 Ways to Increase Your Income - NEW	2005-07-27	11:00	EDT	closed
20 Ways to Increase Your Income - NEW	2005-07-27	16:00	EDT	closed
Maximizing Teller Standards -	2005-07-28	11:00	EDT	closed
The Benefits of Implementing Kirchman Ba	2005-07-28	14:00	EDT	closed
Online Strategies for Retention & Wallet	2005-08-01	14:00	EDT	open
Simplified Tax Notice Solution	2005-08-04	14:00	EDT	open
What You Don't Know About Your Documents	2005-08-04	16:00	EDT	open
Simplified Tax Notice Solution	2005-08-09	11:00	EDT	open
Online Strategies for Retention & Wallet	2005-08-10	14:00	EDT	open
Bankway 101 (Part 1) - Bankway Basics	2005-08-11	11:00	EDT	open
Online Strategies for Retention & Wallet	2005-08-11	14:00	EDT	open

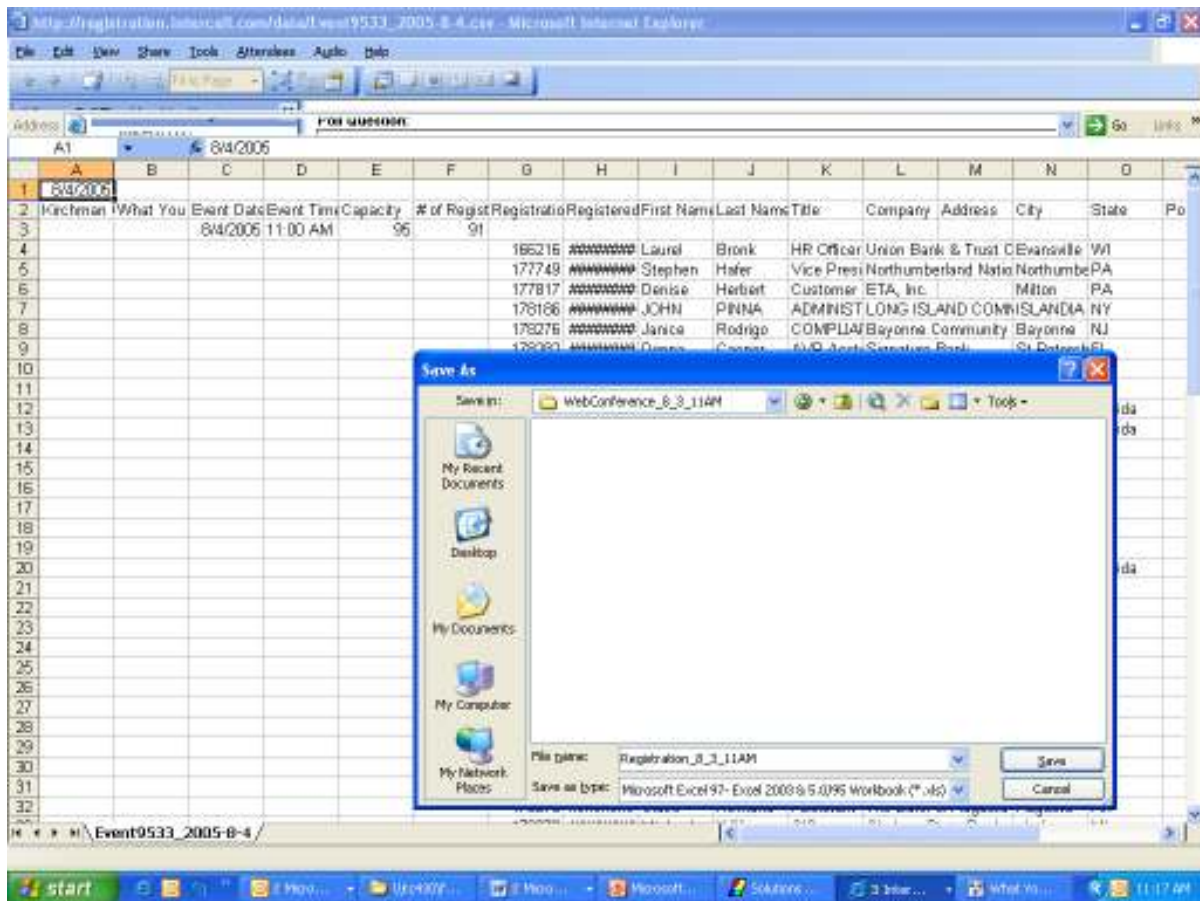
Scroll down to the appropriate web conference, highlight it, and click VIEW LOGS.



Click the Red Text stating “Log for:”



Go to FILE, SAVE AS.

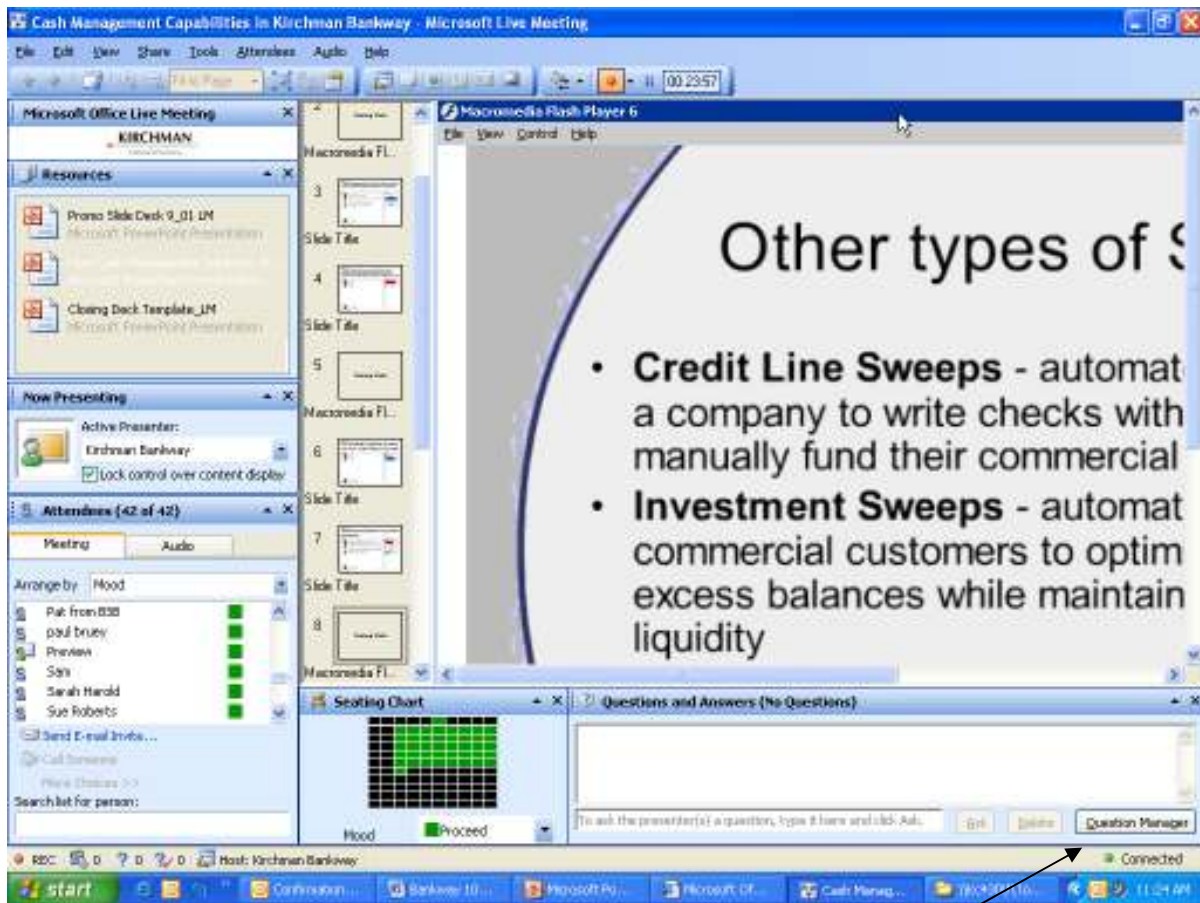


Save the file as Registration\_MM\_DD\_time of day  
For example: Registration\_8\_3\_11AM

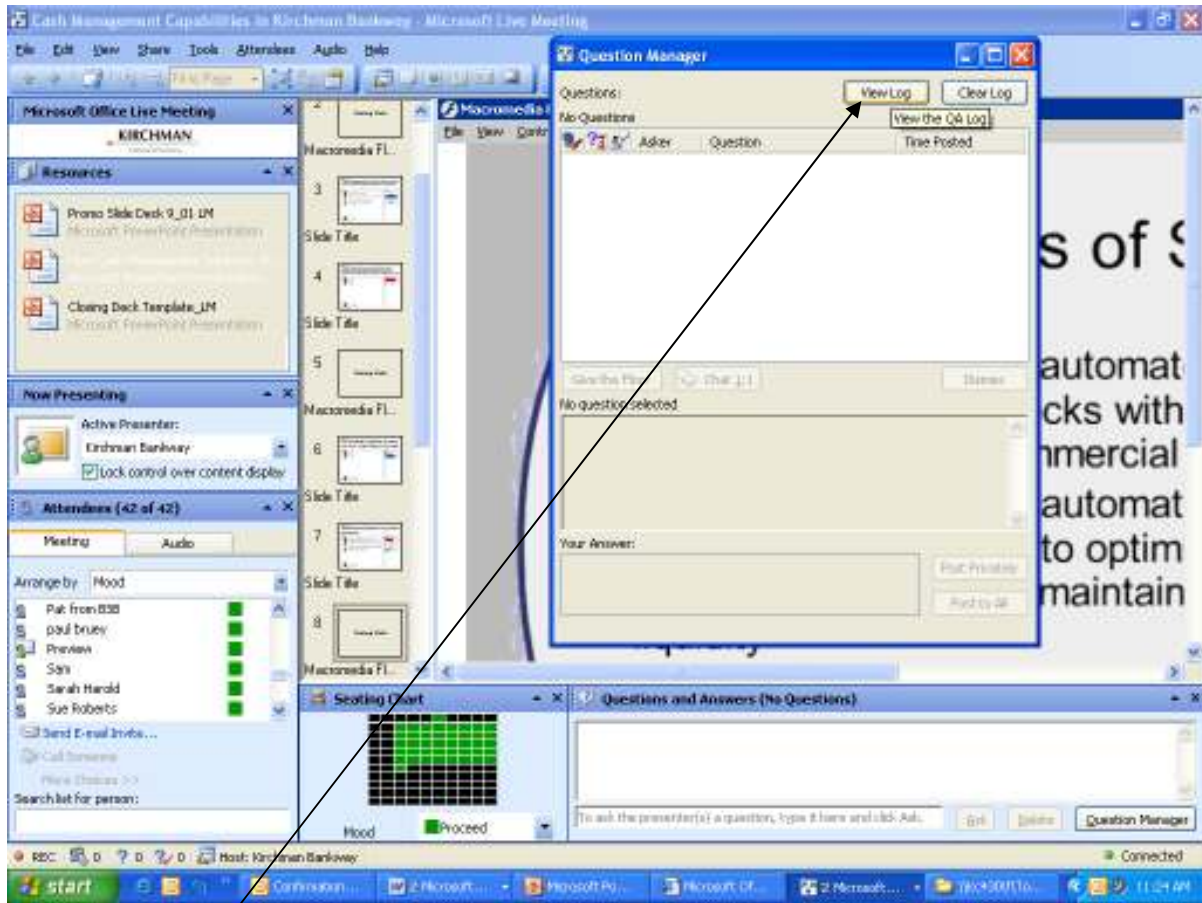
Save the file as an Excel spreadsheet.

Save the file in the F: drive under the Topics folder and the appropriate folder.

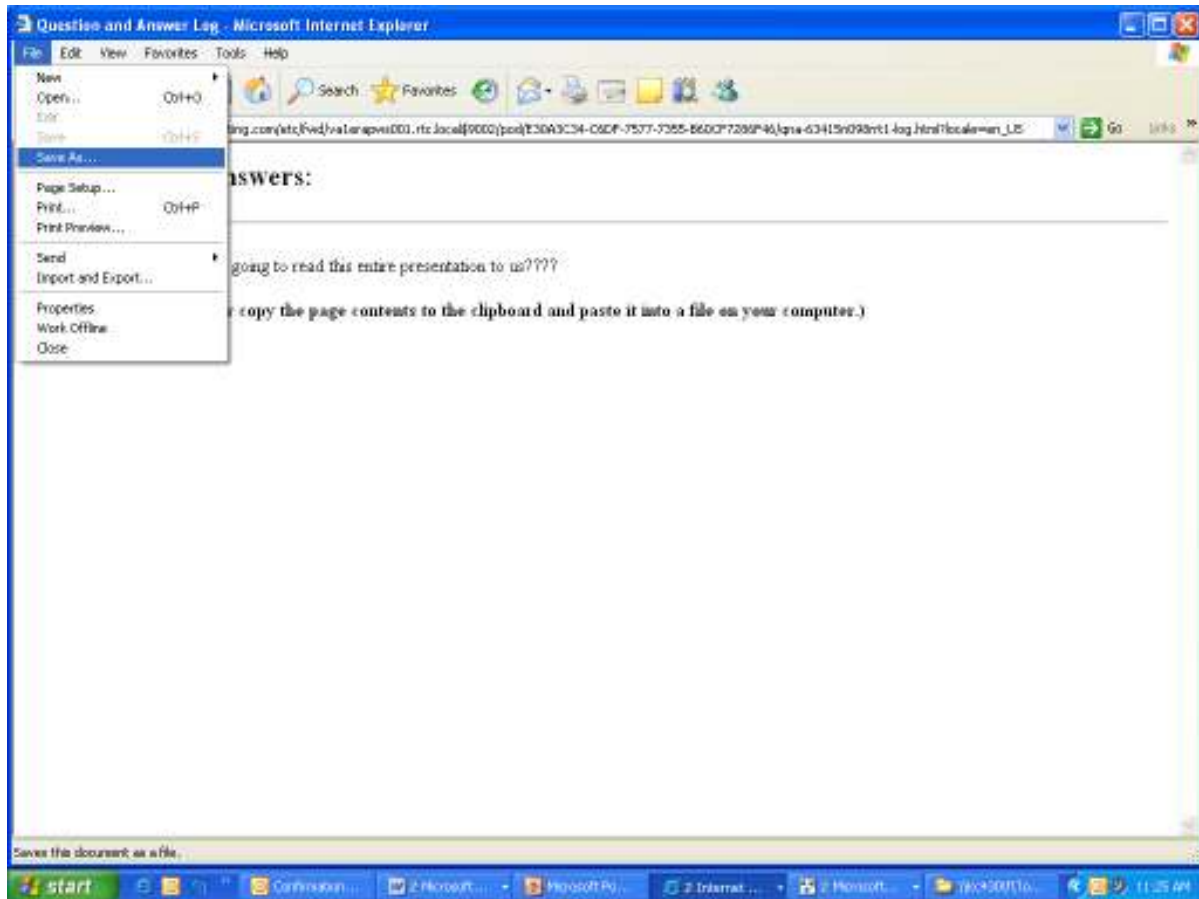
### Saving the Q&A Log from the Session



Within the Web Conference, click the QUESTION MANAGER button.



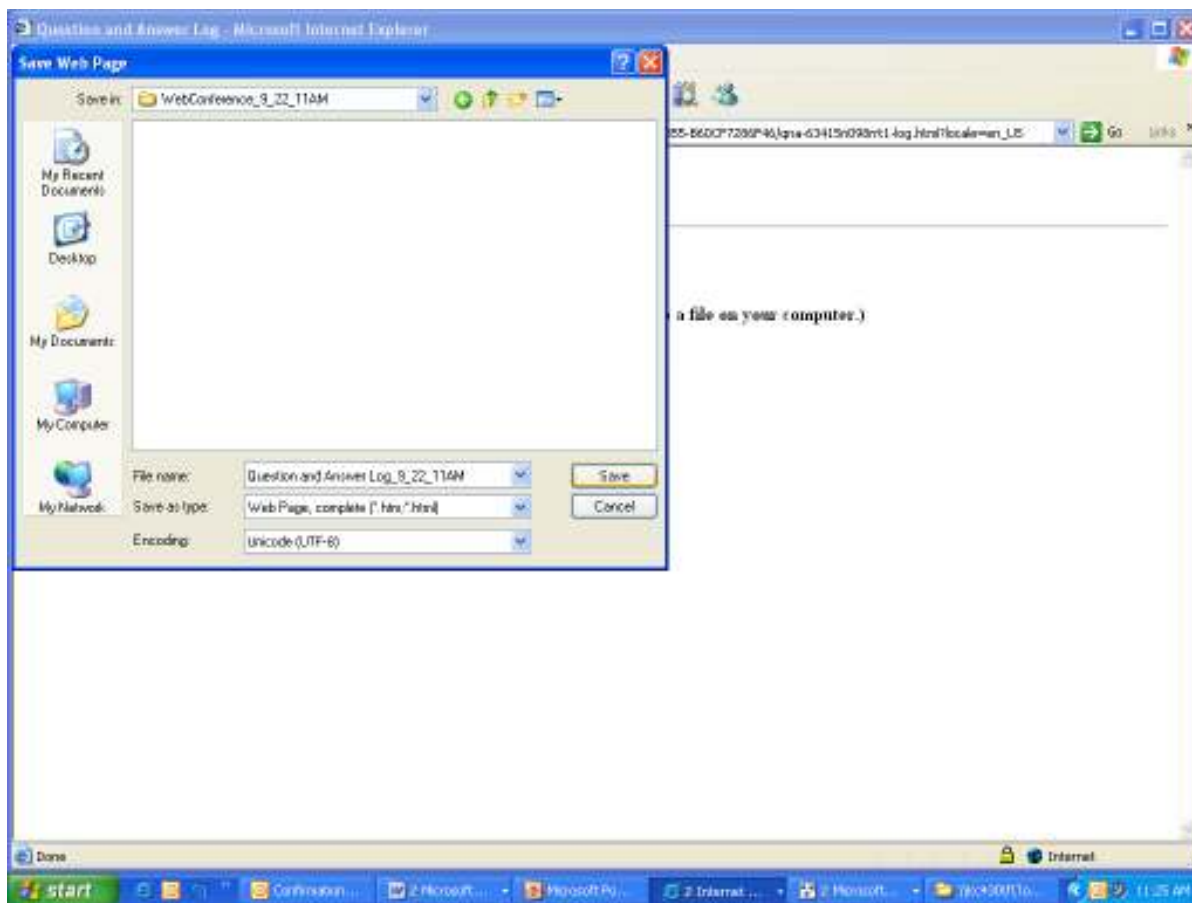
Click VIEW LOG.



Click FILE.

SAVE AS.





Save this under the appropriate folder:

As of 9/22/05, the correct path is Barry's F drive, Topics, the Session Folder, WebConference\_mm\_dd\_TimeOfDay

Name the file:

Question and Answer Log\_mm\_dd\_TimeOfDay

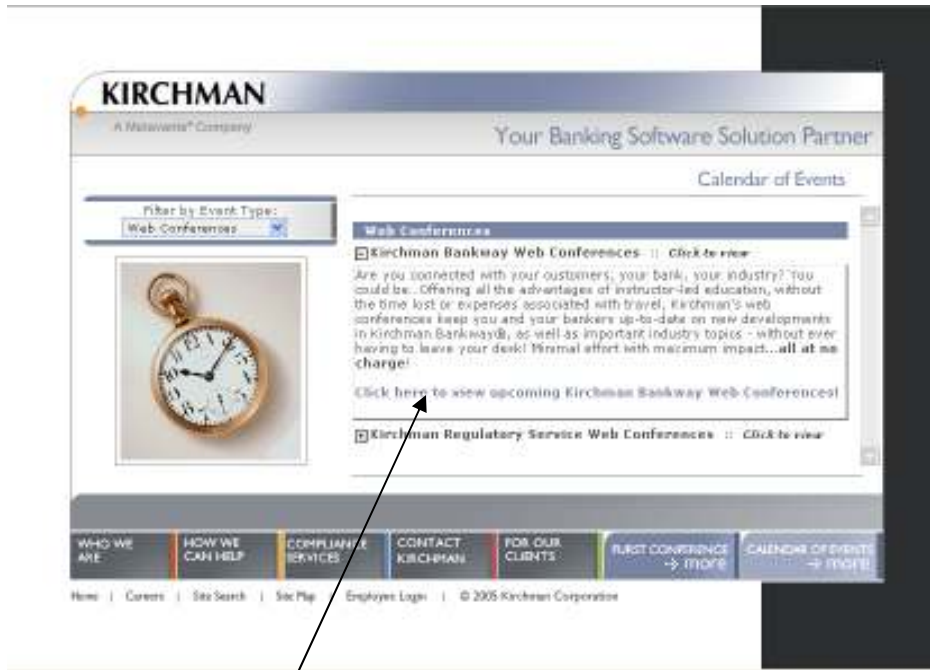
## Web Conference Support

The purpose of these instructions is to help us better support our customers in registering for web conferences, as well as attending our web conferences.

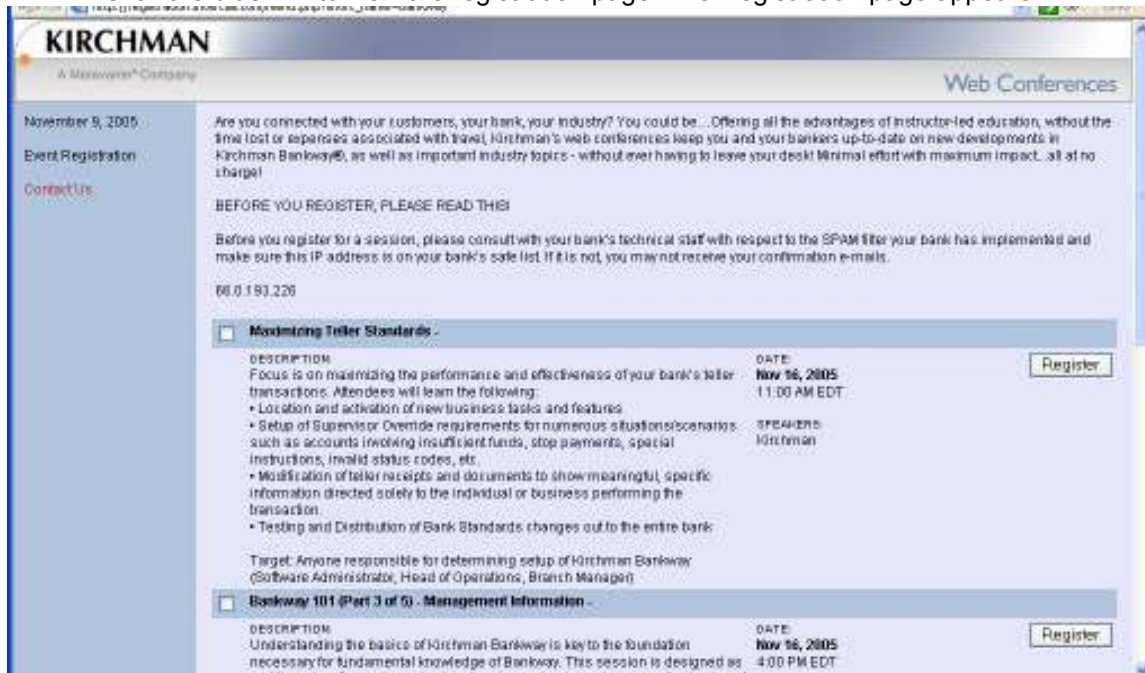
### **Registering for a Web Conference**

You do not need to be a member of our web site to register for a web conference.

1. Go to <http://www.Metavante.com>
2. Click **Calendar of Events**.
3. Above the image of a watch is a drop-down list. Select **Web Conferences** from the list. Click the plus next to Metavante Bankway Web Conferences. You should see this screen.



4. Click the blue link to view the registration page. The Registration page appears.



5. Select the web conference you want to attend and click **Register**.  
6. Enter the required information and click **Submit Registration**.

**KIRCHMAN**  
A Metavante® Company

Web Conferences

November 8, 2005

Event Registration

Contact Us

Event Registration: Page 1 of 1

Title of Event: Maximizing Teller Standards -

Date of Event: Nov 16, 2005 11:00 AM

First Name (required)

Last Name (required)

Title (required)

Company (required)

City (required)

State/Province (required)

Phone (required)

Email address (required)

Submit Registration

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- You are now registered. A confirmation screen appears. We recommend you print this for reference, but it is not necessary. You should receive a confirmation e-mail at the e-mail address you entered almost instantaneously (depending on your network speed and security settings).

**NOTE:** If you don't receive an e-mail quickly, there may be an issue with your e-mail. For example, it may be an internal-only e-mail address or the bank blocks unknown outside e-mail. If you don't receive the e-mail, notify Metavante Client Events in a reasonable period. We can provide the necessary information for the session. This will also block you from receiving the session materials, and we don't want that to happen.

- Unless you register within a day of the session, you will receive a second, reminder e-mail. This usually will have links to the session materials for you.

### ***Attending the Web Conference***

We recommend you test your connections to the web conference at least 30 minutes prior to the session. This avoids any last-minute support issues.

In your e-mails, you received three pieces of important information



- Meeting ID
- Link to the session
- Conference Call number with a Participant Code

To attend the session:

1. Click the link in your e-mail. It looks something like:

<https://www.livemeeting.com/cc/Metavante/join?id=tellerstandardsa&role=attend>

You will be on this screen:



---

[Login](#) [Support](#) [Help](#)

[My Home](#) **Join Meeting**

To join a meeting, type a Display Name as you want it to appear to others in the meeting. Enter a Meeting ID and Meeting Key (if required by the meeting organizer), and then click Join Meeting.

Display Name:  Example: "Chris from Sales"

Meeting ID:

Meeting Key (if required):

By using the Microsoft Office Live Meeting service you agree that at any time during this meeting any presenter may initiate the recording function, which will result in your conversation and communications being recorded and logged by Office Live Meeting. If you do not agree to recording, please exit Microsoft Office Live Meeting.

- The link should cause the **Meeting ID** to fill automatically. Enter your name or bank name in the **Display Name** field. Click **Join Meeting**. Do not enter a **Meeting Key**.

**NOTE:** This is sometimes a source of trouble. Some e-mail systems have incorrectly formed the session link, thus causing the Meeting ID to not work correctly. If the customer has problems, hand-type in the Meeting ID and it should work fine.

**THERE MUST BE UNIQUE MEETING IDS FOR EVERY SESSION.** Therefore, the morning session's ID will NOT work for the afternoon – Even if the topic is the same. They are considered two meetings in the system.

- Related to this, we have seen another issue. The customer may hand-type the link and get one letter wrong (l (L) rather than a 1 (one) is common). Because the link causes a pre-fill, some have had hard time getting back to not having a pre-fill and starting from scratch.

To start from scratch, go to:

<http://www305.livemeeting.com/cc/Metavante/join>

- Enter your bank name and e-mail address. Click **Join Meeting**.

The screenshot shows the 'Join Meeting' page on the Kirchman website. The page has a blue header with the Kirchman logo and 'A Metavante® Company' text. Below the header is an orange navigation bar with 'Login', 'Support', and 'Help' links. The main content area is white and features a 'Join Meeting' heading. Below the heading, it states 'The following information is required to enter this meeting.' There are two input fields: 'E-mail:' with the value 'jdnadler@kirchman.com' and 'Company Name:' with the value 'Kirchman'. A blue 'Join Meeting' button is positioned below the fields.

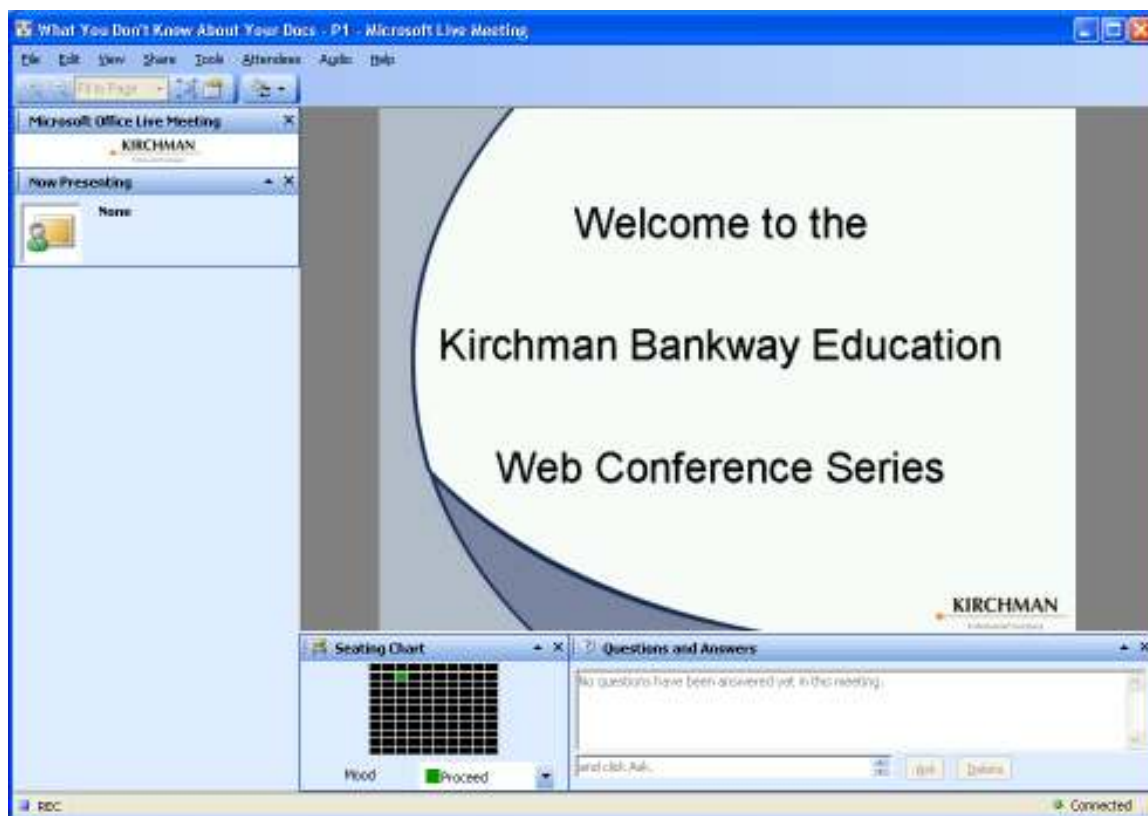
- If you already have Live Meeting installed, you will enter the meeting. All you have left to do is call the Conference Call number and enter your Participant Code.

If you do not have Live Meeting installed, the system will attempt to install the Client for you. It may look like Internet Explorer considers it a security hazard, but it is safe. This can take as much as five to ten minutes to install, depending on your network speed.

**NOTE:** Some customers have had Windows 98 or security issues and they can not install the software. If that is the case, use the Web Version. This is a Java-based client that runs in your web browser with no software to install.

You should not have any time limits on when you can enter. We set these sessions up so you can enter them at any time prior to the web conference, so you can test connections.

If your screen looks like some variation of this, you are in the meeting!



- Dial the Conference Call to hear the audio portion of the event. Unless we tell you otherwise, this number is always the same for Bankway Web Conferences.

1 (800) 717-1692  
Participant Code: 815119

## CDs and Automated Sessions

We have several types of media we create:

- Web Conference media** – this is the content for the actual web conference. Viewing is in a linear fashion and controlled by the session moderator
- CD Media** – This is an altered version of the web conference media that is tied to menu system and the viewer can watch it in a non-linear fashion by themselves.

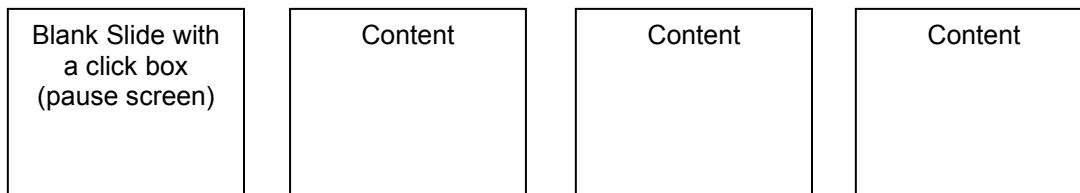
- **Automated sessions** – This is an altered version of the web conference that exists on the web and the viewer watches it at their own pace, but in a linear format. There is no menu system. We have nicknamed this “anytime viewing”.

All media types should have two files: .swf file and the accompanying .htm file. The .htm file calls the .swf file and is automatically generated by Captivate.

**If we are creating a CD, there are six parties that need to sign off on the delivery of that CD to our customers (in this order):**

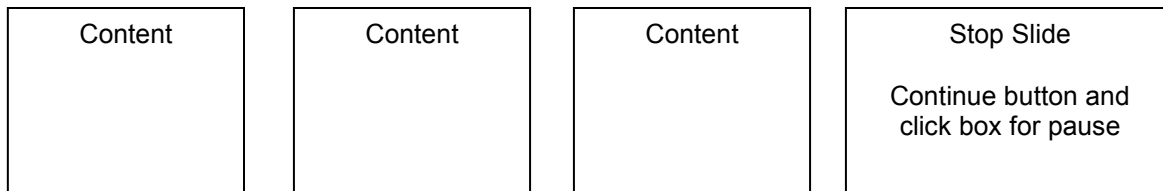
1. **CD Developers (Barry Nadler/Tiffany Evans)**
2. **Product Development (Product Managers)**
3. **Marketing (Sales – Harry Arnold)**
4. **Meredith Gessart**
5. **George Jennings**
6. **Mark Viselli**

### **Web Conference Media**



Publish with no navigation as a .swf file with HTML pages

### **CD Media**

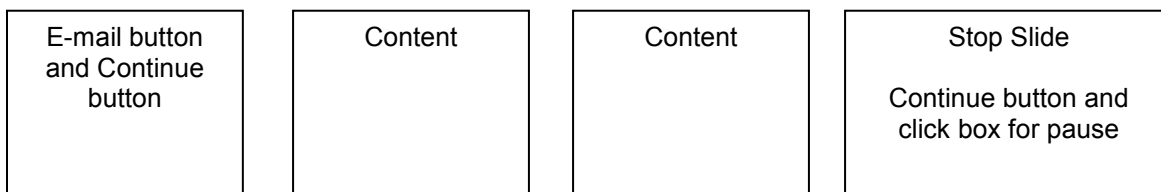


Publish with navigation as a .swf file with HTML Pages

Path to run file = title.htm

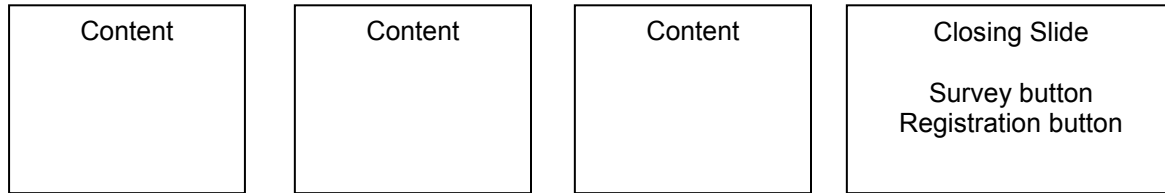
**<obsolete procedure, but left it for research purpose>**

### **Automated Media Segments**



Publish with navigation as a .swf file with HTML Pages

Path to run file = <http://www.Metavante.com/bn/title.htm>

**Automated Media Ending Segment**

Publish with navigation as a .swf file with HTML Pages

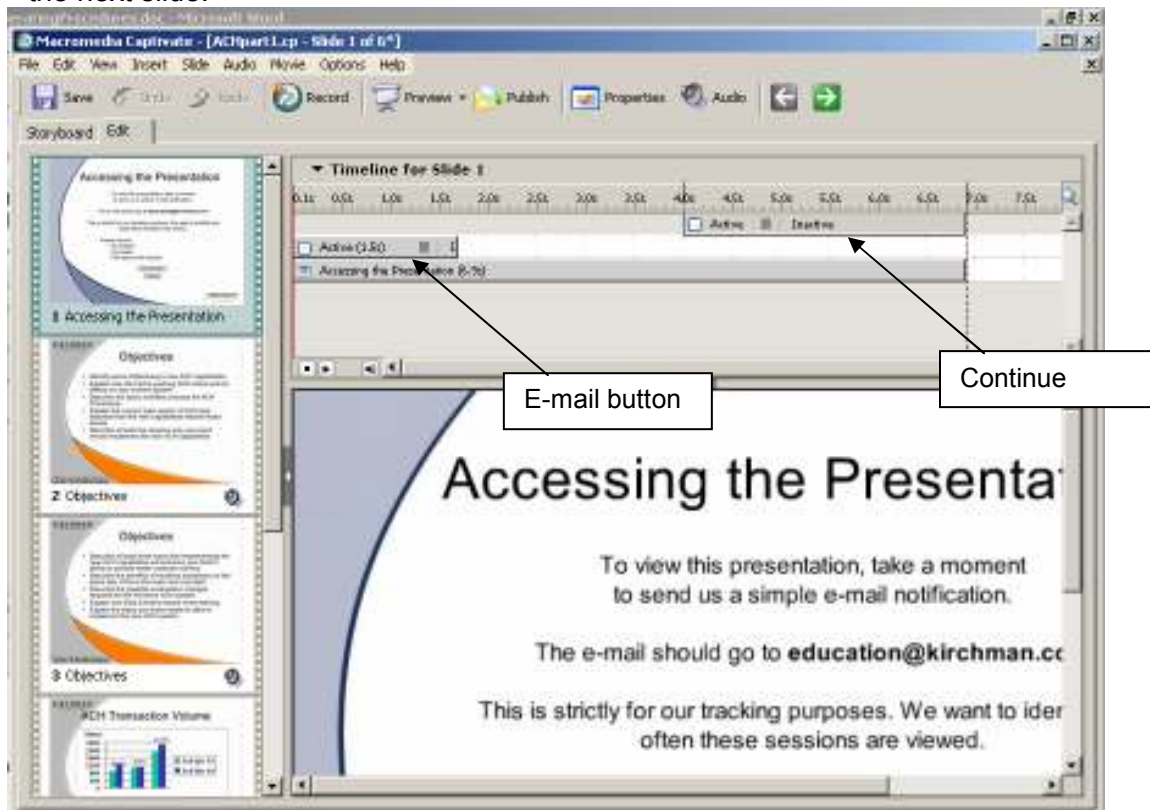
Path to run file = <http://www.Metavante.com/bn/title.htm>

To create a recording for “anytime viewing” from a web conference:

1. Work from the last segment to the first segment. You have to link them together and it works easier this way.
2. Remove the white, pause slides at the beginning of the segments
3. If it is not the last segment, add a PowerPoint slide at the end stating “This is the end of the segment”.  
If it is the last segment, add a PowerPoint slide at the end stating “You have reached the end of the session. Please click each button”  
These slides already exist, so you don’t have to create them from scratch.
4. If it is the last segment, add a button that links to the survey (in a separate window) and a button that links to the registration page (in a separate window).  
If it is not the last segment, you need to add a button that links to the next segment’ URL in the same window. Because you have worked backwards, you can upload each segment as you publish it. Then, you can effectively test your buttons. Otherwise you need to wait until you are finished.
5. On the first slide, you need to add a PowerPoint slide asking for the viewer to send you an e-mail. The slide asks for the viewer’s name, bank, and topic they are watching. Add a button to this slide that launches an e-mail using the viewer’s e-mail client. Set this button to pause the movie until clicked.

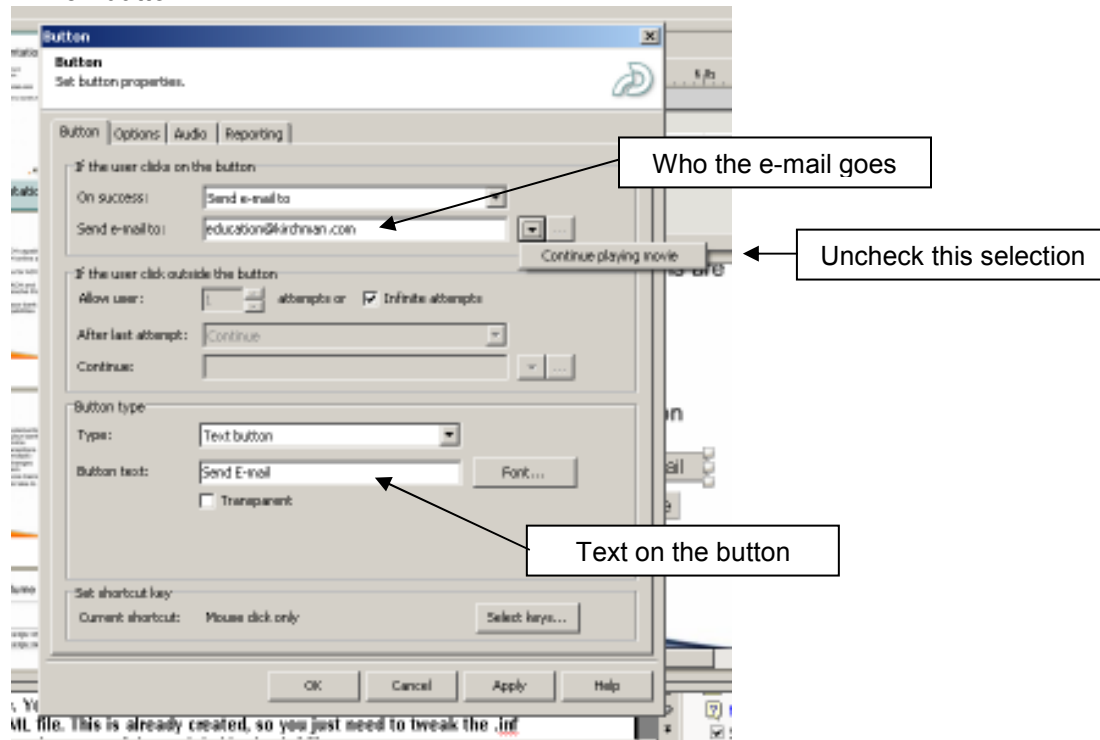


- After the e-mail button, place a “Continue” button. Then, when the user clicks the E-mail button, it disappears and the “Continue” button appears. This “Continue” button links to the next slide.

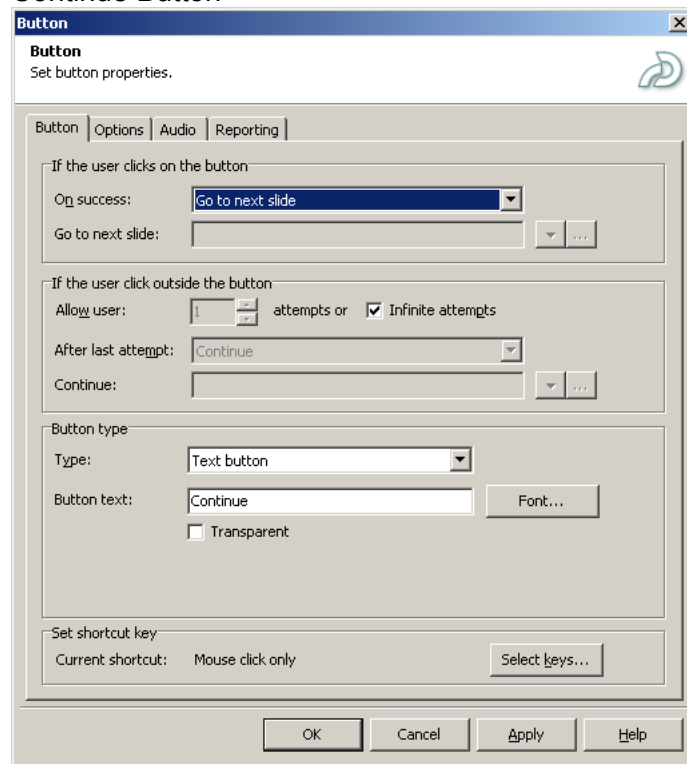


- If you have files larger than 7-8 Mb, you can not upload them. You need to get the Metavante Web Administrator access to them so he can upload them directly for you.

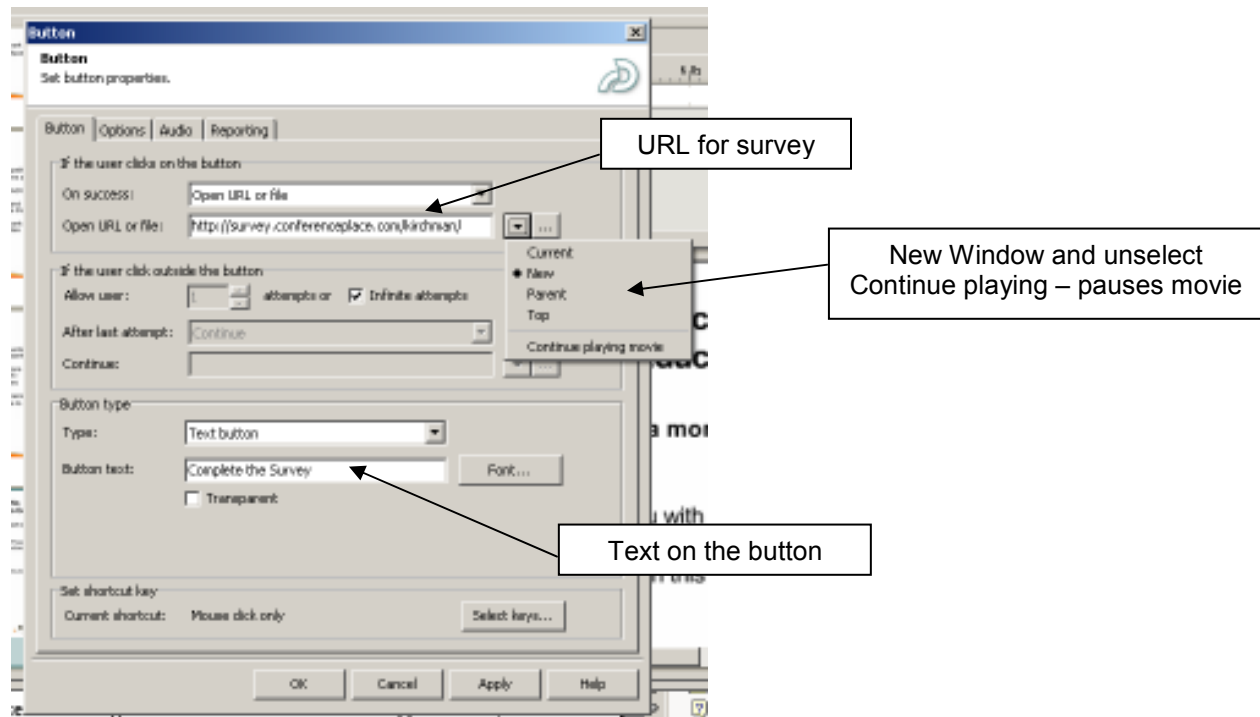
E-mail button:



Continue Button



## Survey Button:



## &lt;End Obsolete Procedure&gt;

## Creating a CD

The main difference in this type of media is a main menu and that the files will reside on a CD and not on a web server. This affects the paths to the files to which you are linking. CDs also need to be able to Autolaunch the menu file. You can not Autolaunch HTML files directly. You need to launch an EXE file that launches the HTML file. This is already created, so you just need to tweak the .inf file a little. You only need to change the name of the CD label in the .inf file.

The CD's autorun.inf file looks like this. Change the "label" item. This is what appears in My Computer when they load the CD.

- [autorun]
- open=launcher.exe
- open=winopen /index.html
- label=Bankway Browser

Create the menu in Photoshop. This allows for layout. Use layers to become the rollovers. You can use the same menu over and over if you rename the PSD (Photoshop Document) for each menu. Use ImageReady to develop the actual workings of the menu system. You will use slices and rollover states to make the menu work. It is not the intention of this guide to teach you how this works – spend some time with the tools to learn these basic features. When you are satisfied with the file, save the optimized HTML file.

The menu HTML file must be called "index.htm" because that is the name the AutoLauncher looks for.

Another trick you can perform is having the CD open multiple files automatically. The kicker is that they will not open simultaneously. They will open one after the other. In other words, when the user has finished one application, the next will automatically open. We used this to have a Promo launch and then, when the user exits this, the copyright license appears and they are "on to the show".

To do this, we used a DOS batch file. The file is a basic text file with a .bat at the end instead of .txt. This is the contents of the batch file, "play.bat".

- @pptview.exe /L "playlist.txt"
- @index.html

Here is what these commands mean:

- **@pptview.exe /L "playlist.txt"** – this launches the PowerPoint Viewer and looks to a file called "playlist.txt" for the filename to launch.
- **@index.html** – this is the name of the copyright license file.

The autorun file for this trick looks like:

- [autorun]
- open=play.bat

Because they have a CD, you don't need the slide for the e-mail request at the beginning or the survey/registration slide at the end.

You are not linking to files on a web server anymore. You need to link to files in the same folder on the CD. Therefore, the "Next Segment" buttons link to "filename.htm" instead of <http://www.Metavante.com/bn/filename.htm>.

One other portion of the CD that is important is that the screens pop up in the center of the computer monitor and that the user does not have to scroll. There is a JavaScript we use to make this happen in the HTML code of the main menu page.

This is a two-part JavaScript. Part 1 is in the header. It identifies the size and position of the window when it opens.

This code goes just before the <!-- End Preload Script -->.

```
<!-- Window Resizing -->
```

```
<script language="JavaScript">
```

```
<!--
```

```
function openWindow(url,name)
{ popupWin = window.open(url,name, ' resizable, width=980,height=770,left=15,top=10')
}
// -->
</script>
```

```
<!-- End Window Resizing -->
```

```
<!-- End Preload Script -->
```

**Part 2** goes at the point of the link. It tells the browser to call the JavaScript command. Everything in this link is standard from Photoshop except the Bold piece. The italic piece changes per link. This identifies the file to which this link links.

This is what comes out of Photoshop:

```
<A HREF="A2I_How_To_p1.htm" TARGET="_blank"
      ONMOUSEOVER="changeImages('BankerInformation',
'images/BankerInformation-over.gif'); return true;"
      ONMOUSEOUT="changeImages('BankerInformation',
'images/BankerInformation.gif'); return true;">
      <IMG NAME="BankerInformation" SRC="images/BankerInformation.gif"
WIDTH=539 HEIGHT=30 BORDER=0 ALT=""></A>
```

Only change the first line to read:

```
<A HREF="javascript:openWindow('A2I_How_To_p1.htm','theWindow');"
      ONMOUSEOVER="changeImages('BankerInformation',
'images/BankerInformation-over.gif'); return true;"
      ONMOUSEOUT="changeImages('BankerInformation',
'images/BankerInformation.gif'); return true;">
      <IMG NAME="BankerInformation" SRC="images/BankerInformation.gif"
WIDTH=539 HEIGHT=30 BORDER=0 ALT=""></A>
```

### **CD Labels**

We have the CD template we are currently using. All we need to do is change the title. If the CD is for a new feature, expect that Marketing will want to drive the look of the CD to match any marketing message they may create.

## CD Development Standards

### **Movie Screen Size**

When you publish the movie, it should have a screen size of 950 X 712. This is slightly smaller than a standard 1024 X 768. It allows the user to definitely see that they are in a separate window. It also allows for browser title bars and such.

### **Menu**

- Segment Names - Open segments in a separate window sized for 950 X 712 screen and positioned in center of screen
- CD Title
- Needs an item that states “Best viewed at 800 x 600 resolution”
- Links to session materials (overviews and PPT slides)
  - Make one file if time allows

### **Content**

- Should include objectives for session
- Each segment should address two to three objectives
- Quiz questions should map to objectives
  - Quantity of questions is dictated by objectives
- If there is a quiz, there should be an audio lead-in to the quiz
  - “Let’s take a moment now for a short quiz”
- If no quiz, there should be a lead-in to the next segment
- Segments should start on a text slide defining the segment topic(s)
  - Do not start on a screen shot.
  - Include a slide that states “In this segment...” and review the segment

### **Quizzes**

- Questions coming from Web Conference session will be multiple choice, True/False, or Yes/No
  - Other question types can be devised to meet needs of CD, such as Matching, fill in blank, and essay
- Info gathering quizzes are not appropriate for CDs without a mechanism for Metavante to receive answers
- Quizzes should offer one less time to answer questions than the number of questions. This allows the possibility of getting question wrong. So, if there are four answers, user gets three tries. If there are two answers, user gets only one try
- All quizzes state “Select the appropriate answer and click Submit” two lines after the question.
- If there is more than one attempt allowed, you will have these response choices
  - “Correct” – if you select correct answer
  - “That is incorrect. Please try again” – if you select incorrect
  - “Incorrect” – after you have made limit of incorrect answers
  - “Please select an answer” – if you do not select anything
  - “Please try again” goes away ONLY if there is a True/False or Yes/No question
- If the answer is “False” or “No,” in the response, make sure you provide the correct information.

- If the statement is “Yes” or “True,” make sure to restate the correct answer in the response for repetition sake.
  - Many times, you can use the same statement if the answer is incorrect or correct.
    - Correct. The sky is blue.
    - Incorrect. The sky is blue.

### ***Closing Slide***

- Place a text box on slide stating “If you would like to review your scores and the quiz, please click the **Forward** button. When you are done reviewing the quiz, you will come back to this screen.”
- All closing slides (except for final slide) have a “Next Segment” button that launches the next segment in the same browser window.

### ***Standards for Labeling***

- Title (full title)
- Master CD
- Date

### ***Implementations Division and CDs***

Because of the nature of what this division does, we have made some of our web conference recordings available to them. Currently, the only one that is in question is the set of Bankway 101 CDs. Now we are offering this for a fee. However, as a service to our customers, we want this CD set to be available to new banks as part of their installation process. Here are the standards we have in place for this process. These will be the guidelines for any other educational CDs that fall into this category.

- We will house the master CDs.
- Each new BANK (not branch) gets one set of Bankway 101 CDs for Free. Implementations will provide us a branch number.
- If a bank wants more than one copy (for multiple branches) they need to purchase them from us off the web site.
- Because these CDs are copyrighted and tracked at the branch level, Implementations will need to order them from us at the time of need.
- We will deliver the bank’s CD to the designated representative in Implementations.

Under the appropriate circumstances, we may work out something with the Education division to allow us to promote and show off the CDs at the end of their workshops.

## **CD Sales Administration**

### ***Invitations***

The invitations created for the CD's follow the same format as the Web Conference invitations. The difference is that these invitations can have a colored background. The verbiage on the invitations must be cleared and finalized through George Jennings. These invitations will be sent out via Mass e-mail. Follow Mass E-mails procedures for web conferences.

### ***Flyer***

The flyers can have the same layout as the invitations. Your creativity is encouraged in this entire marketing process. The flyer will be provided to the SAMs and adequate internal personnel who can distribute them to their clients.

### ***Verbiage for Registration/ordering site***

This verbiage should include the details of the product. What it is, Price, and what the terms are. All CD's are being licensed at the Branch level. This means that only the branch that purchases the CD will have rights to it. It can not be duplicated for other branches. They must purchase their own. This is an important part of information that the customers must be informed of at the ordering stage. The line can read "Product licensed to the registered Branch Only" or something in that area.

### ***PowerPoint Slides with Verbiage for web conference promotion***

The slide or slides, depending on the topic and verbiage need to be implemented in the opening and closing decks for web conference. Verbiage needs to be written for them. This is so there is a uniformed message for promotion. Who ever is hosting the web conference must have this verbiage for each session.

### ***Informational Sheet***

This sheet is an informational sheet that will be passed internally to all those who will be helping to promote this product. As always, final verbiage must be approved through George Jennings. This sheet should include a details description of the session (the description used for the promotion of that given web conference will work), and the terms of the sale. Put your self in their shoes... ask questions they would ask, and make sure that your informational piece answer them. Send this sheet once it's been approved to all internal contacts via e-mail.

### ***Pulling Information from Registration Site***

Go to <http://registration.intercall.com/admin/index.php> sign in and from the list of items, find the "order" list, as you may have titled it for that given topic. Click on View Logos, and save them to the CD folder that you may have assigned. Ex: "Bankway 101-CD Orders." Open the saved file from your folder and Voila... there is your list. Format the cells to fit all the given information. Once you have initially pulled the list for the first orders of that particular CD, all other weeks, it is suggested that when you go to pull the information, find the last person from the previous list, and select the people, under that person. Cut and Paste into your master list. A new list is not generated from the registration website, in order to eliminate duplicates, this is what is suggested.



### **Creating the Spreadsheet**

- There needs to be a “Master workbook” created that contains a spread sheet which holds the information that you pull from the registration site in its entirety. All the formatting needed on this page, is adjusting the cells to fit all the information.
- A second sheet, within this “Master workbook” is needed containing all the ordering information. This sheet can be called “Invoicing\_M/DD/YY.” The list that you pull from the registration site, may include some cancelled orders, this you will need to notate as cancelled on the “Master workbook sheet”, since you can not do this on the list from the web site. There is no need to include that cancelled order on the “Invoicing\_M/DD/YY” spread sheet. Also the Master list will include unnecessary information for ordering purposes, such as reference number. The “Invoicing\_M/DD/YY” should contain the following Information, in the respective order:
  - Date (this date should be the date that you are sending this to Word Processing. Orders are pulled Fridays by noon.)
  - SAMs Name
  - First, Last name of customer (all in one cell)
  - Title
  - Company
  - Address
  - City, State, Zip (all one cell)
  - Branch # and or Name (many Banks just put a number. If this is the case, you need to input the word “Branch” in front of the number so that it will merge correctly in the “Mail Merge” settings that Word Processing has implemented for us
  - Invoice Status: If we have received payment insert “Payment Received M/DD/YY” for corresponding bank. If we have sent the invoice, insert “Invoiced M/DD/YY”
  - Delivery Status: Enter when the package was sent to “Distribution Services” for shipment, by inserting “Sent M/DD/YY”
- A second “Workbook” must be created. This is the information that will be sent to Word Processing. In this Workbook, you should create sheets for weekly orders. This sheet must include all the items mentioned above **except** the last two. It is important that this sheet be formatted as mentioned above in order for the mail merge that Word Processing does to be successful. The sheet can be titled “Orders\_thru\_M/DD/YY” and for every week a new sheet within the workbook should be made. At the end of the month archive that workbook under that month. For example, you should save that workbook as “CD\_Orders\_MMY”
- You must update these files on your computer to keep the status current, as you use this information for your “Weekly Status” reports.

### **Sending A CD out to customer**

The package should include: A thank you letter, Survey (if needed), and the CD.

Fill out a shipping form, found in the intranet. As a rule of thumb, always send CD's through regular standard mail, unless the bank needs it immediately, then use FED EX.

## Weekly Status Report Standards

Every Friday, by noon, a weekly report of what you did this week, and what you plan on getting done next week should be submitted to the head of Client Events. Presently it is George Jennings. This report needs to include your YTD sales of CD's, YTD invoiced Banks, YTD revenue, YTD orders. Other information needed on this report includes other items you may have on your list of things to do. For example, your status on a web conference, invoicing, etc. You are part of one group within Client Events. That means that you, along with other members of the "Web Conference" group, make up the Web Conference division for Client Events. One status report needs to be submitted to the head of Client Events. The status report on web conferences include the actual attendance of a session, the number of registered people through the registration web site, the score for that given session, YTD registrations, connections, and scores, as well as the stance on upcoming web conferences. This is all done in an Excel Spreadsheet.

## Important Contact and Login Information

### Client Events Live Meeting Log in

- <https://www305.livemeeting.com/cc/Metavante/loginPage>
- User Log In:
- Password:

### Client Events Calling Information

- 1-800-717-1692
- Moderator Code:
- Participant Code:

### Client Events Registration

- <http://registration.intercall.com/admin/index.php>
- User Log In:
- Password:

### FTP Web Site Upload

- <ftp://www.Metavante.com>
- Login:
- Password:

### Simple2Communicate Billing/Moderator Switchboard

- <https://secure.simple2communicate.com/customer/>
- Email address:
- Password:

**Campaign**

- <http://distribution:81/>
- Login:

**Barry Nadler**

- x 3504

**Maria Santos**

- x 3384

**George Jennings**

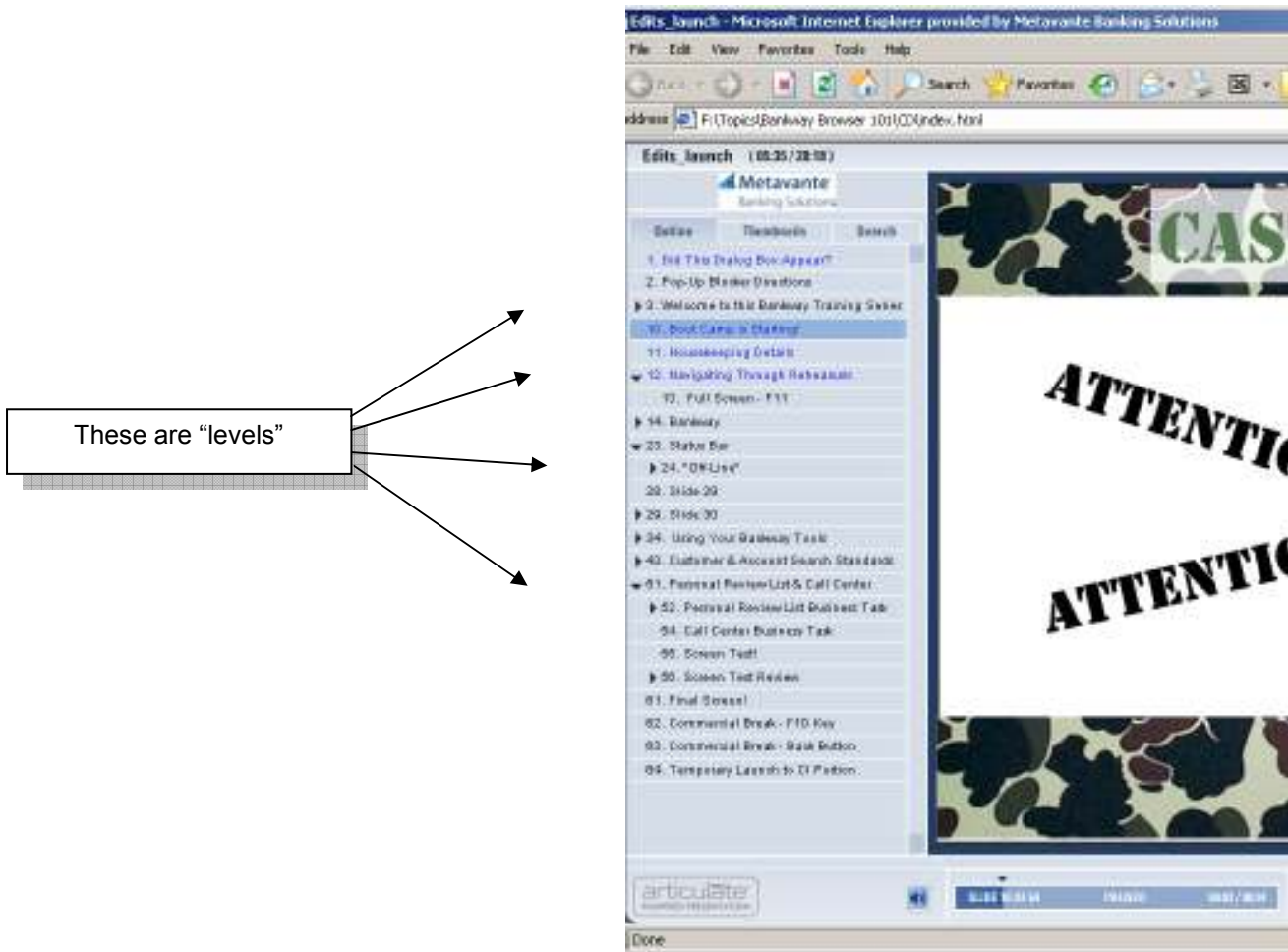
- x 3227

**Ryan Dodge**

- x 3275

**Client Care**

- x 1247



- We expand the level when the user reaches the section. This means that the left navigation will expand to show the contents as the user gets to it.
- We allow the user to expand the sections and view them when they want.

This also refers to the **Slide Properties Manager (Articulate > Slide Properties Manager)**.

- Every slide should have a name that identifies what it is fairly clearly. If the title is not clear, change it.
- If you have multiple slides with the same name, that is all right. The first one should appear at a higher level than the subsequent ones.
- You should run your presentation mostly in full screen mode, however, there are times when you should show navigation.
  - The first slide of a new segment
  - When you pause the presentation (simulations, tests, test reviews, lots of text on screen)
- The presentation should be set to advance automatically, except when you pause the presentation by design.

Here is a sampling of the **Slide Properties Manager** from the Customer Information portion of LAUNCH!

Type	PowerPoint Slide Title	Display In Navigation As	Level	Change View To	Presenter	Audio Playlist	Move To Next Slide
1	Bankway Browser - Customer Information	Welcome to Bankway Studio	1	Standard			Automatically
2	Customer Information Basics	CI Business Tasks	2	Slide only			Automatically
3	[No Title]	Your Role - The Bank Employee	2				Automatically
4	ACT 1 SCENE 1	ACT 1 SCENE 1 - Multiple Personal Review	1				Automatically
5	[No Title]	Multiple Personal Review List	2				Automatically
6	[No Title]	Customer Tab	2				Automatically
7	Rehearsal Time - Part 1	Rehearsal Time - Part 1	3	Standard			By User
8	[No Title]	Additional Customer Information	2	Slide only			Automatically
9	Rehearsal Time - Part 2	Rehearsal Time - Part 2	3	Standard			By User
10	[No Title]	Tracking Tab	2	Slide only			Automatically
11	[No Title]	Tracking Data	3				Automatically
12	[No Title]	Tracking in Personal Review List	3				Automatically
13	[No Title]	Accounts Tab	2				Automatically
14	[No Title]	General Ledger Tab	2				Automatically
15	[No Title]	Management Tab	2				Automatically
16	[No Title]	No Tracking Tab	2				Automatically
17	Time for a Screen Test	Screen Test	2	Standard			By User
18	[No Title]	Screen Test Review	2				Automatically
19	Screen Test Review	Screen Test Review	3				Automatically
20	Screen Test Review	Screen Test Review	3				Automatically
21	Screen Test Review	Screen Test Review	3				Automatically
22	Screen Test Review	Screen Test Review	3				Automatically
23	Screen Test Review	Screen Test Review	3				Automatically
24	ACT 1 SCENE 2	ACT 1 SCENE 2 - Customer Summary	1	Standard			Automatically
25	Customer Summary Business Task	Customer Summary Business Task	2	Slide only			Automatically
26	Customer Summary Business Task	Customer Summary Business Task	3				Automatically
27	Rehearsal Time	Rehearsal Time	2	Standard			By User

### Attachments and File Paths

Articulate does not handle attachments as well as we would hope. Therefore, we have resorted to using links.

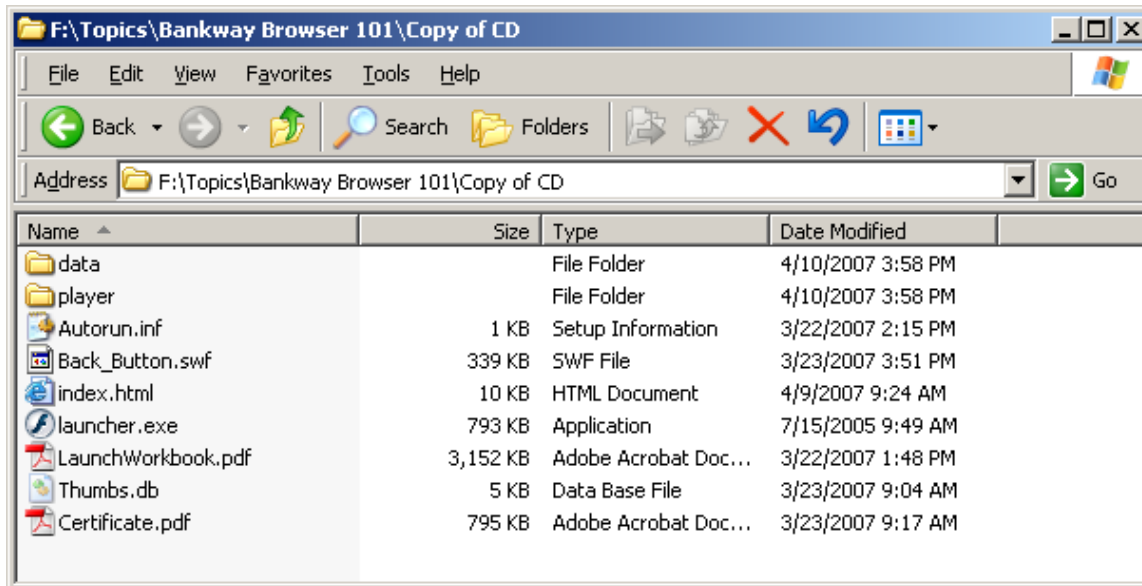
We link to the workbook and the certificate at the end.

The path to the workbook is: workbook.pdf

(Assuming the presentation is one file) the path to the certificate is: certificate.pdf

If you have to separate the presentation, the folder structure changes and you need to identify where files live.

Sample structure for one segment (**folder names** are bold, file names are unbold):



Player.html (renames to index.html for CD)

Workbook.pdf

Certificate.pdf

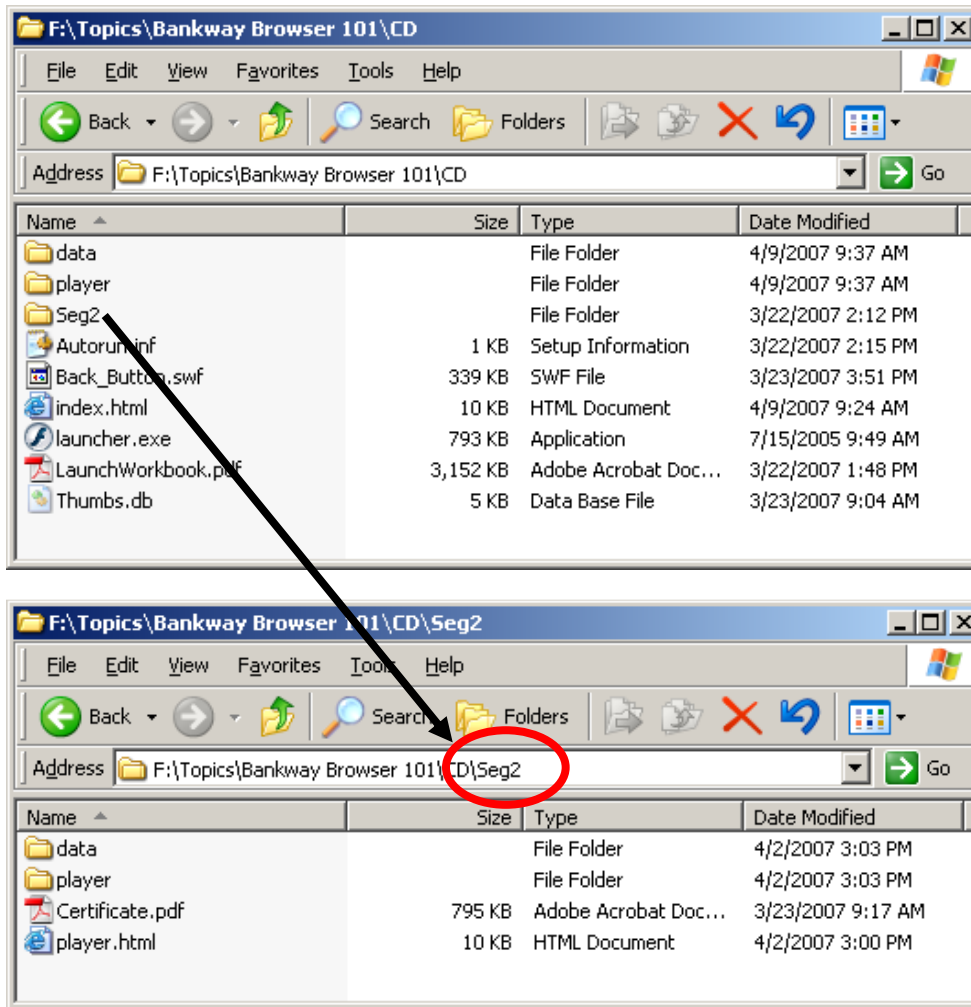
#### **Player**

Player XML files

#### **Data**

Flash files that make up presentation

Sample structure for two segments (**folder names** are bold, file names are unbold):



Player.html (renames to index.html for CD)

Workbook.pdf

### **Seg2**

Player.html

Certificate.pdf

### **Player**

Player XML files for Seg 2

### **Data**

Flash files for Seg2

### **Player**

Player XML files for Seg1

### **Data**

Flash files that make up Seg1

If you are a two-segment structure, it is a little different. You have to link into **Seg2** folder to launch the second part of your presentation.

The link to Segment two looks like: Seg2/player.html

### Flash Files

When you insert a Flash file, for our purposes, it is usually a simulation. These files need a slide letting the viewer know what is occurring (they are going to a new window, this presentation is paused, when they are done they should come back to the course and click the Next Slide button). This slide should be consistent every time you show it, but the audio can vary slightly (so it does not get boring). See **Simulation Slides** in the **PowerPoint** section.

You need to identify how long the audio file is for this slide. Take one second off the length and use that as your buffer time. For example, if you have a 15-second audio clip, buffer for 14 seconds. This allows your audio to synchronize to the start of the simulation.

### File Structure Requirements

Articulate requires a strict file structure or you will lose your audio links. When you import an audio file, it creates a new file in a folder named after your PowerPoint. Inside this folder, there will be a folder called **Narration**. These are the audio files to which Articulate links. It does the same thing with Flash files, except the folder into which they go is called **Objects**. You can not move these files or rename them without affecting the entire unit.

#### Project1 (Folder containing the Presentation)

- PowerPoint1.ppt
- PowerPoint1**
  - Narration**
    - Audio1.wav
    - Audio2.wav
  - Objects**
    - Flash1.swf
    - Flash2.swf

If you need to move these files for another person to edit, publish the project files to a zip file and then extract that zip file in the new location. It will keep file structure intact.



## **Captivate**

*Captivate* allows users to easily capture and record screen and software activity. This capture information can then easily be transformed into interactive presentations. *Captivate* is also the main audio processing tool used for **The Bank**.

When you record a new movie, it should be sized to 1014 X 713

### **Text Boxes**

Text boxes are the primary format for providing information to the viewer in our simulation.

Use them as necessary; just beware to not cover important portions of the simulation screen.

### **Instructions**

This is the main use for text boxes. These appear on most every screen. They appear in the bottom left corner.

If you want a viewer to type pieces of information, you need to provide it for the entire length of time. This is a standard rule – While the instructions are on the screen, the viewer can perform the desired action.

We use the Captivate Blue style for this text box. The font is blue.

### **Failure**

These boxes contain text that directly instructs the viewer what to do if they have performed an incorrect action. We may also provide a common mistake they can look for (such as spelling).

We do not provide success text boxes. Use audio to identify this. Failure boxes are linked to click boxes and text entry boxes.

We use the standard Captivate Red failure box.

### **Hints**

Depending on the level of skill required for a simulation or segment, we may offer a rollover hint button. Its text is in a hint text box.

We use the standard Captivate Yellow text box for this. We also use blue text.

## Verbiage

It is very important that the content you place in the text box is standard and consistent. If not, it will be confusing to the viewer.

- Menus
- Menus contain submenus
- Business tasks
- Click OK or Click the OK button (use one in the instructions and the other in the failure message)
- You select from a menu or list of choices
- Click buttons, down-arrows, tabs, or on a text entry area
- Press the **X** key on your keyboard or Press **Enter**.
- Dialog boxes appear, not display (display is a monitor on your desk)
- Bankway Home Page
- The toolbar contains icons
- The Status Bar

For instructions on how to do something, if you mention something that appears on screen or a key they are supposed to press, bold the item. If it is in failure text, you may want to change the color to a contrasting color and underline it, as well. This assists it in standing out.

Avoid passive phrases at all costs. If you do not know what this means, ask. A passive phrase allows you to put ...”by whom” at the end of it. For example, “the command must be selected...by whom?” The correct way to say this is “select the command”.

Speak in present tense – unless something really happens in the future (or the past). The viewer is working with your simulation in real time.

## Text Entry Boxes

These are boxes you place in your simulation that allow your viewer to enter text. Through a command, the system receives this text, compares it to options that have been approved, and if correct advances the presentation.

These are trickier than they seem. Bankway has lots of text entry fields. In general, you should set the Tab key as the submission command. However, if you are programming the last of a series, you need to use the Enter key. This allows you to simulate the key command for the OK button.

Allow for a space at the end of the text. If you are entering financial values, make sure you offer all options. For example: 75,000.00, 75000.00, 75,000, 75000, and the same variants with a space at the end. This allows the user to accidentally mistype.

Unless you need to be picky for some reason, turn off match case. “John Smith” should be just as acceptable as “john smith”.

We use a font size of 12pt. Use either Arial or Tahoma as your font. Be consistent with the font, though.

The text entry box needs to cover the entire area of a text box on your screen. In the final product, it will be obvious if it is not.

## Tabbed interfaces

If your screen offers a tabbed interface, you should allow the viewer to explore a little. This will create a feeling of freedom and control for the viewer.

To do this, capture all the screens you want them to be able to view. For the sake of example, let's say you have four tabs.

They start on the first tab and you introduce the exploration and that they should click next when they want to advance.

First, you need a duplicate of your starting slide. You do this because it is possible they may come back to this tab (unless you don't allow this). You do not want them to receive the same audio as the introduction.

Your layout will look like:

Slide 1 - intro  
Slide 2 – same tab as intro (different audio)  
Slide 3 – tab 2  
Slide 4 – tab 3  
Slide 5 – tab 4  
Slide 6 – result of Next button

You need five click boxes (four tabs and one for the Next button).

Slide 2 should have click boxes on the tabs that jump to slides 3, 4, and 5.

Slide 3 should have click boxes on the tabs that jump to slides 2, 4, and 5

Slide 4 should have click boxes on the tabs that jump to slides 2, 3, and 5

Slide 5 should have click boxes on the tabs that jump to slides 2, 3, and 4.

Place a click box on Slides 1-5 for the click box. It should jump to slide 6. It is entirely possible that the user skips the exploration.

### **Rollover Fields Within a Screen**

There are times when you have fields on a screen that you do not verbally describe during a simulation. However, you want to allow the viewer to learn about what they are for. The appropriate way to do this is via a rollover.

- Use a clear box as the rollover area for the item.
- Add a highlight box for this area (0 line weight, 90% transparency, color (R 0 G 128 B 192
- Send all rollover captions to the front. They should not be under any other items on the page. Make sure you test this...it can be fickle.

## Audacity (Recording Audio for PowerPoint)

### Vocal Tweakings

We export audio files from Audacity as .wav files, rather than .mp3 files.

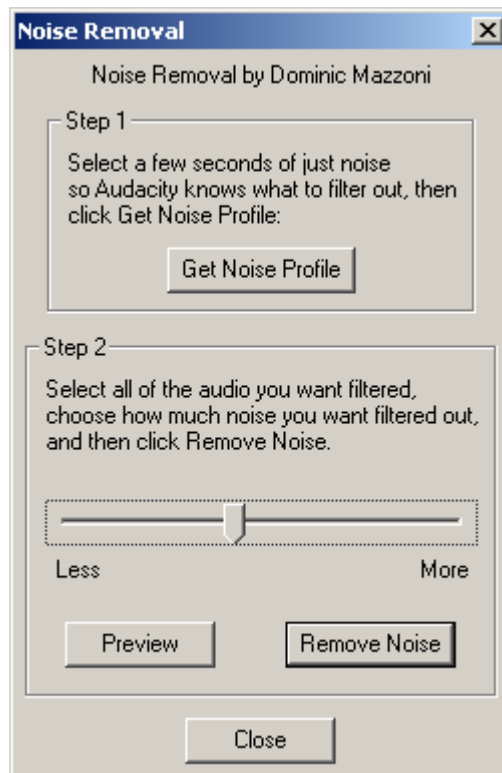
#### Noise Removal

**\*\*This processing effect is subjective. Sometimes the final product is worse than when you started due to warbly audio or an echo.**

**If the result is not acceptable, do not perform this processing. \*\***

With our recording conditions, there is usually an audible hiss in the recordings. This assists us in removing that from the final clip.

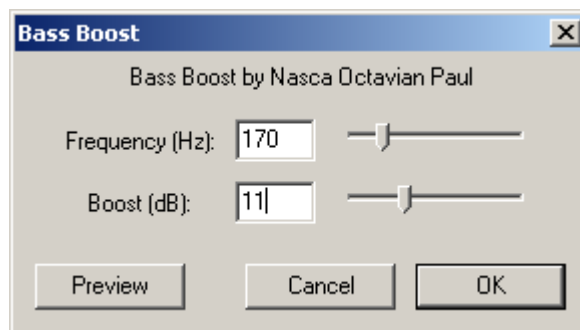
- Select a small section of noise and set that as your **Noise Profile**
- Select the entire segment of audio and drop the **Noise Removal** setting in **Step 2** back one towards **Less**



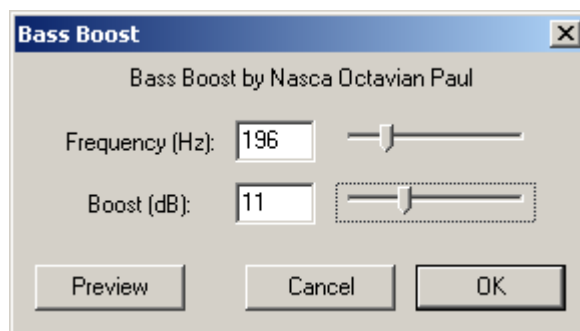
#### Bass Boost

This will increase the lower end in your voice and thicken it up. You will need to find an acceptable setting for yourself. We are each different.

Barry's settings:



Maria's settings:



### Audio Pops

Make sure you review all audio clips. After processing, they may have an audible blip at the end. You may also hear these if you make edits to your audio and it contains multiple tracks. Make sure to remove this from your clips.

We export audio files from Audacity as .wav files, rather than .mp3 files.

### Background Music

You can find Background music at these locations:

- <http://www.soundrangers.com> – professional sound clips and music – there is a fee
- **Microsoft Clip Art** – Watch out for midi audio.
- \\Kcterm2\dus public\Educational Services\Forms-Templates-Standards\Training Music\Trainer's Warehouse\Jazzy Tunes for Trainers

### Backing Up Files

You should back up your work files at the end of every week. Connect our separate external hard drive via a USB connector and copy any files you worked on to it.

