UPK Tips & Tricks
How We Make UPK Work for Us!

Session #27415
March 2, 2010
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Background in Education
Experience in Content Development, Management, and Educational Instruction
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Current enrollment 40,255  Over 13,000 employees
Florida State University

- UPK 3.5.1 - August 2009
- FIN 9.0 - April 2009
- HCM 9.0 - October 2008
- EPM 9.0 - October 2008
- OBIEE 10.1.3.4 - April 2009
- Portal 9.0 - November 2007
- Student System – Coming Soon!
Agenda

Prior to UPK

Acquisition of UPK

UPK Mastery!
Training Prior to UPK

- Word document job aids
- Disorganized content/formats
- Instructor-led training sessions
What Do They Want?
Aspects of Training of Highest Importance to Survey Participants

- Easy access to all training documents, exercises, and materials: 40%
- Instructor-led classes: 14%
- Interactive, online classes: 4%
- At your desk training options: 10%
- Multiple formats of training materials (job aids, online tutorials, classroom training, etc.): 32%
Most Effective Training Tools According to Survey Participants

- Written documentation
- Useful web-based support
- Formal classroom trainings
- Hands-on practice
- Visual demonstration of processes
- Job aids including screen shots
- Text-only job aids excluding screen shots
So, Now What?
What is UPK?

- **Oracle User Productivity Kit**
  - Software used to record and play simulated online processes
  - Produces multiple publishing formats *simultaneously*:
    - Simulation modes (See It, Try It, Know It, Do It)
    - Printable guides
    - Testing documents
Acquisition of UPK

- Limited resources
- Limited developers
- Learning curve
- Limited licenses
- Large need
Our UPK Life Cycle

- Education
- Organization
- Development
- Publication
- Encouragement/Communication
“There's a way to do it better—find it.”

- Thomas Edison
Tips & Tricks

- Copy & Paste
- Screen Edits
- Auto Recording
- Options
- Time-Savers
Copy & Paste

- Step 1 – Locate and copy frame
Copy & Paste

- Step 2 – Open new topic, locate placement

Inserts **AFTER** selected frame.
Copy & Paste

- Step 3 – Paste!
Copy & Paste

- Step 4 - Boom!
Copy & Paste Topics

Right click on the topic to copy

Reporting Weekly Punch Time Process

...
Right click on the section to paste the copied topic

Select Paste Special
Select "Duplicate" to ensure changes made to one topic does not affect the other.
Overview:

Understanding Reporting Weekly Punch Time Process

In this topic, you will find detailed information about entering time on a Punch Timesheet. This method of time reporting is for non-exempt OPS employees. As an OPS employee who is using a timesheet to record IN/OUT time, you will not have an

Scenario:

In this topic, you will learn how to report weekly punch time.

*Estimated Length*: 3 Minutes
Start Frame Edit

- Edit/Paint/Snag-It grayed out frames
Start Frame Edit

- Start Frame – Step 1  Go to Next Frame
Step 2 – Edit screenshot

Icon no longer grayed out

Click the Human Resources 9.0 link.
Step 3 – Edit as needed

Make changes and close
Start Frame Edit

- Step 4 – Save & Close

Save (Do Not "Save As")

In response to on-going state fiscal problems, the President recently formed the Budget Crisis Committee.

The Committee will review, analyze and discuss the financial challenges facing the university and develop appropriate recommendations for consideration by the President and the University.
Step 5 – Automatically imports changes into UPK!
End Frame Edit

Edit screenshot icon available
Automatic Recording

- Only available in 3.5 + versions

- Setup: Tools > Options > Recorder

- Record screens without pressing “PrintScreen” between each step!
Automatic Recording
Automatic Recording

On bottom "Recorder" option page

Turn on Automatic
Options

- Developer
  - Image Editor

- Auto-populates Paint as Image Editor
Options

- Content Defaults
- Screen Resolution
- Frame Delay
- Text (Font, size)
Time Savers

- Preparation!
  - Map out navigation
  - Outline Example
  - Address Errors

While Recording
- Minimize Tool Tips
- Protect employee confidentiality
- Scrolls/highlights

Before Recording

Editing
- Edit screen shots before inserting explanations
- Copy and paste
- Snag-It shortcuts
And the Reward...
Benefits of UPK

- Reduces Development Time
  - Simple creation of procedures
  - Produces relevant, simulated experiences
  - Delivers content in multiple formats from a single recording session
  - Designed for non-technical, subject matter experts
  - Automatically records text for each recorded step
  - Automates repetitive PeopleSoft terminology
Benefits of UPK

• Reduces Costs
  • Replaced the need for HR training database
  • Equips staff to confidently perform daily tasks
  • Enables just-in-time training accessibility
  • Reduces frequency staff are out-of-office for training
  • Supports and encourages individualized, self-paced learning
  • Eliminates wait time between classroom trainings
  • Reduces need for printed paper
  • Reduces the need for repetitive attendance in training sessions for users who experience difficulty completing tasks
  • Integrates off-site campuses and staff
Benefits of UPK

- Improves Results
  - Enables mobile just-in-time problem-solving
  - Directs users to relevant content via PeopleSoft Help links and object recognition
  - Emphasizes “whole picture” knowledge through integration of business policies, other related information, glossaries, etc. within content
  - Builds user confidence
  - Protects confidential data
Classroom Training Attendance

Before UPK

After UPK

Financial Classroom Training Sessions

Human Resource Classroom Training Sessions
Consider This...
Things to Think About

- Imbedded Logos
- Standards
- Content Development Workflow
- Centralized Training Website
  - UPK links
  - Printable step-by-step guides
  - Classroom training registration
  - Security roles information
  - Help ticketing system links
  - FAQ’s
  - Contact Information
Caution

- Limited Browser Compatibility
  - Required Browser & Settings for Do It mode

- Miscellaneous Known Issues
  - Network/Domain-related
  - Dual monitors
  - Snag-It
  - Know It mode bubble placement
  - Multiple Installed UPK Versions
Resources

- My Oracle Support
- HEUG Listserv/Peers/Contacts
- Oracle UPK Forums

- “No Template”
- “UPK unexpectedly terminated”
- “Profile already in use”
- Print It mode download errors
FSU Resources

- Developer How To Guides
- Florida State University UPK Standards
- Florida State Training Website
- UPK Browser Compatibility Chart
Questions?
Contact Information

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