UPK Tips & Tricks

How We Make UPK Work for Us!

Session #27415

March 2, 2010

Today's Presenter

Kelley Barton

Florida State University

ERP Training & Communications Lead

Background in Education

Experience in Content Development, Management, and Educational Instruction

Florida State University

Current enrollment 40,255

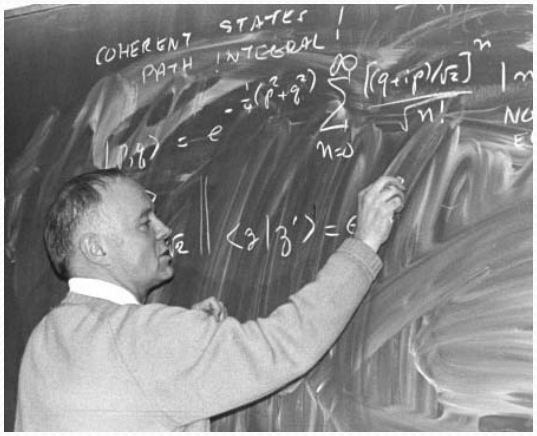
Over 13,000 employees

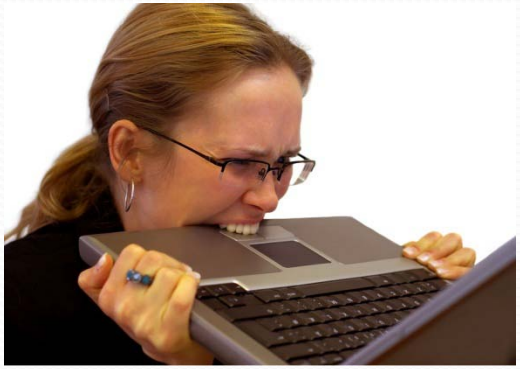
Florida State University

- 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





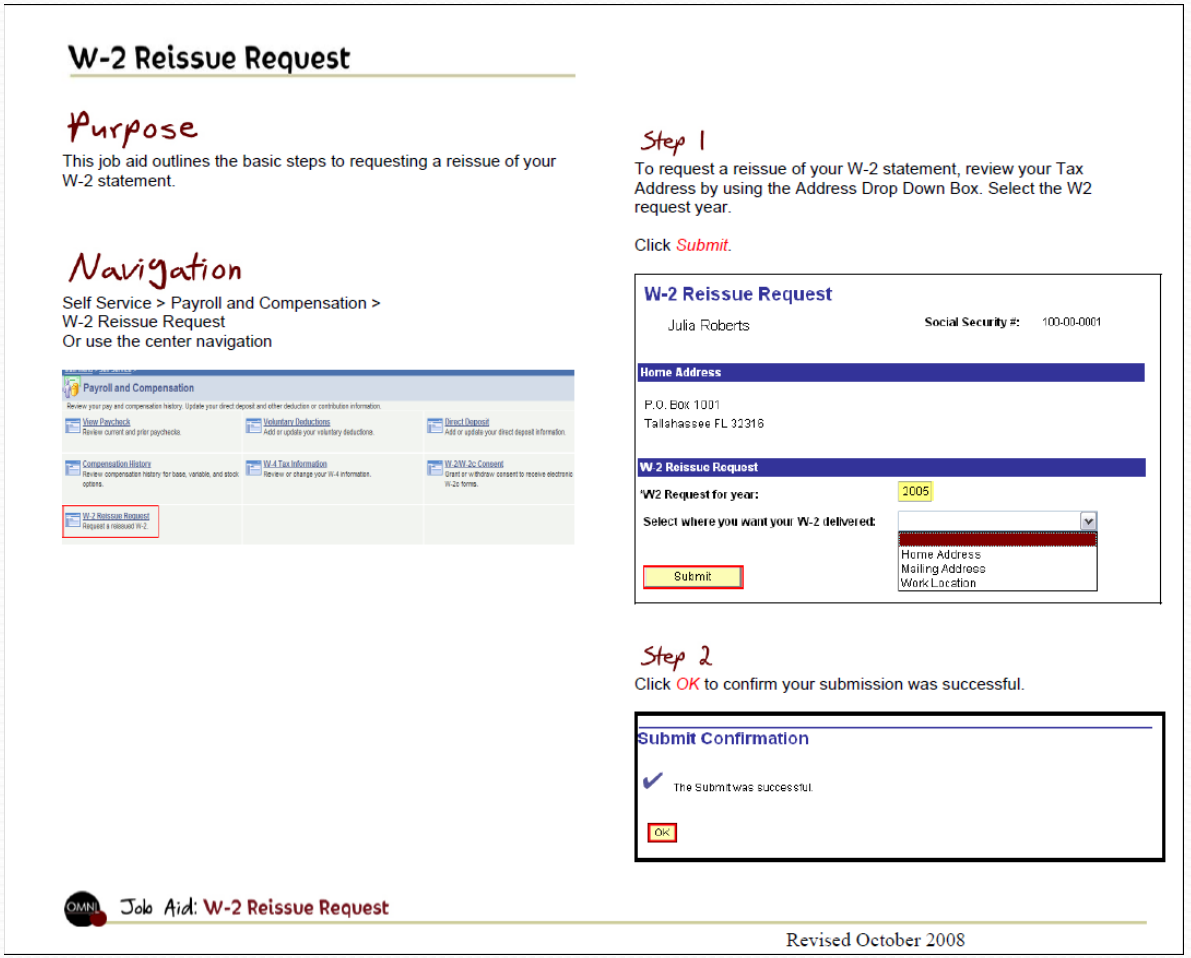
Prior to UPK

Acquisition of UPK

UPK Mastery!

Training Prior to UPK

- Word document job aids
- Disorganized content/formats
- Instructor-led training sessions



W-2 Reissue Request

Purpose

This job aid outlines the basic steps to requesting a reissue of your W-2 statement.

Navigation

Self Service > Payroll and Compensation >
W-2 Reissue Request
Or use the center navigation

Step 1

To request a reissue of your W-2 statement, review your Tax Address by using the Address Drop Down Box. Select the W2 request year.

Click *Submit*.

Step 2

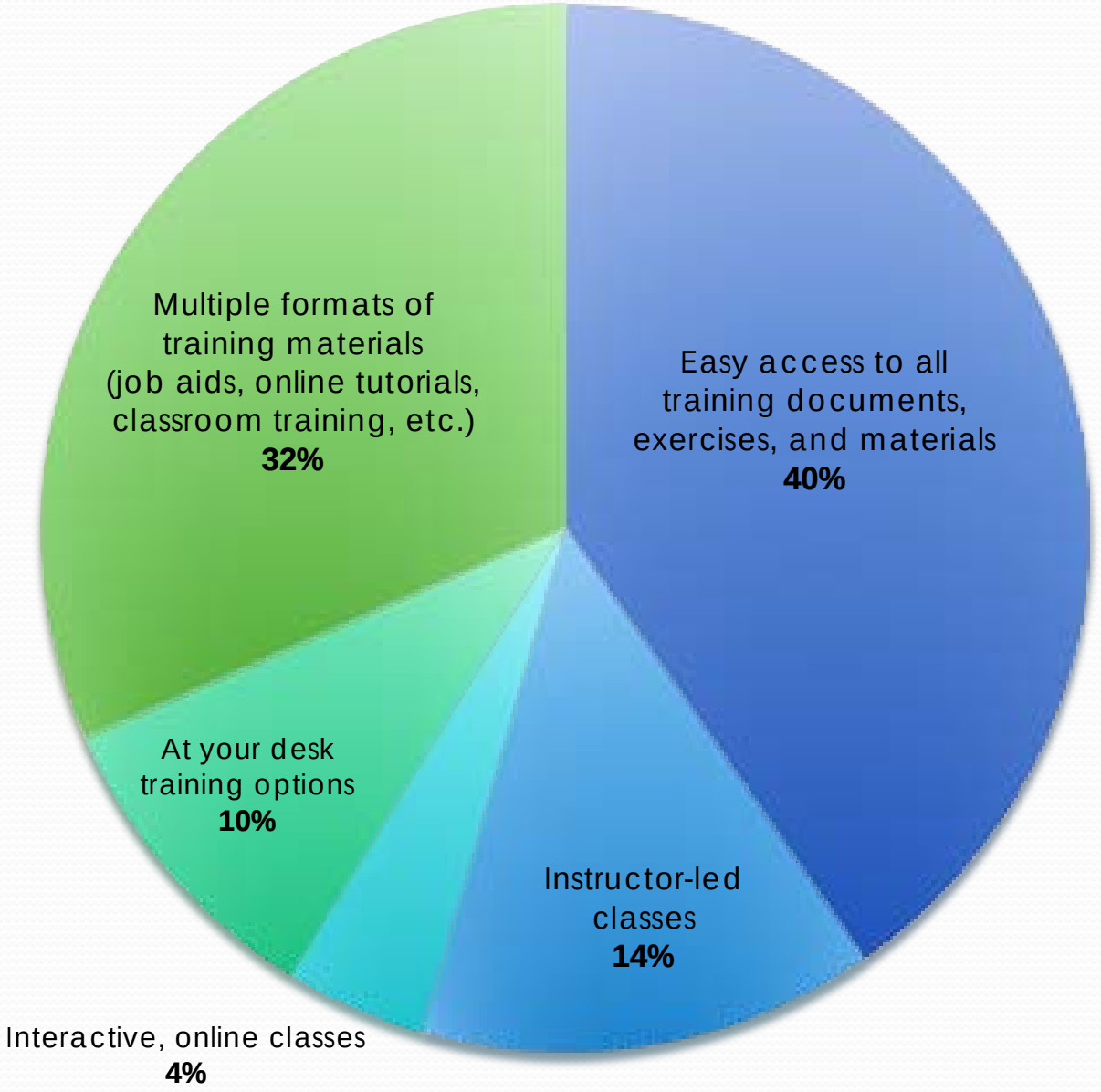
Click *OK* to confirm your submission was successful.

Job Aid: W-2 Reissue Request

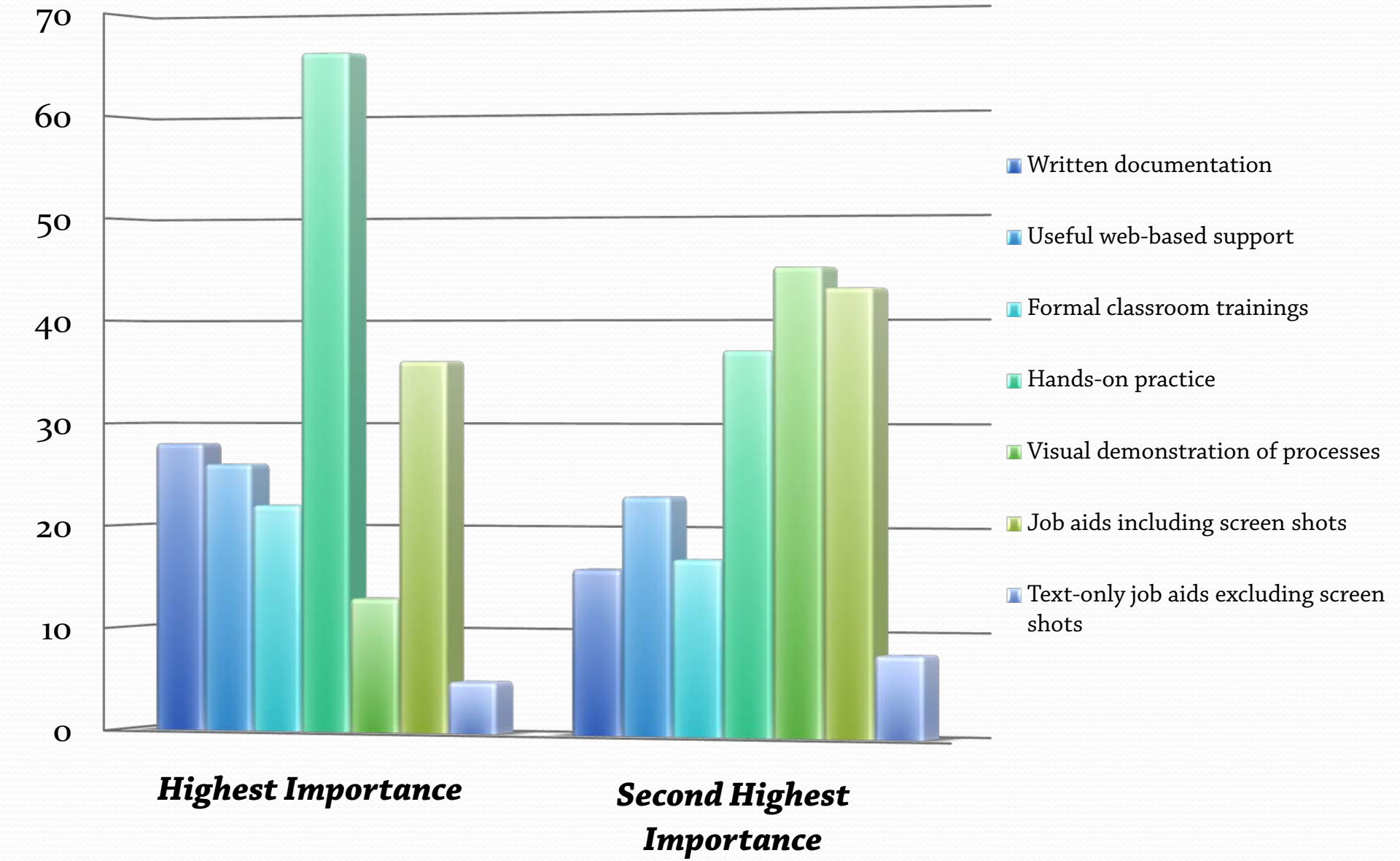
Revised October 2008

What Do They Want?

Aspects of Training of Highest Importance to Survey Participants



Most Effective Training Tools According to Survey Participants



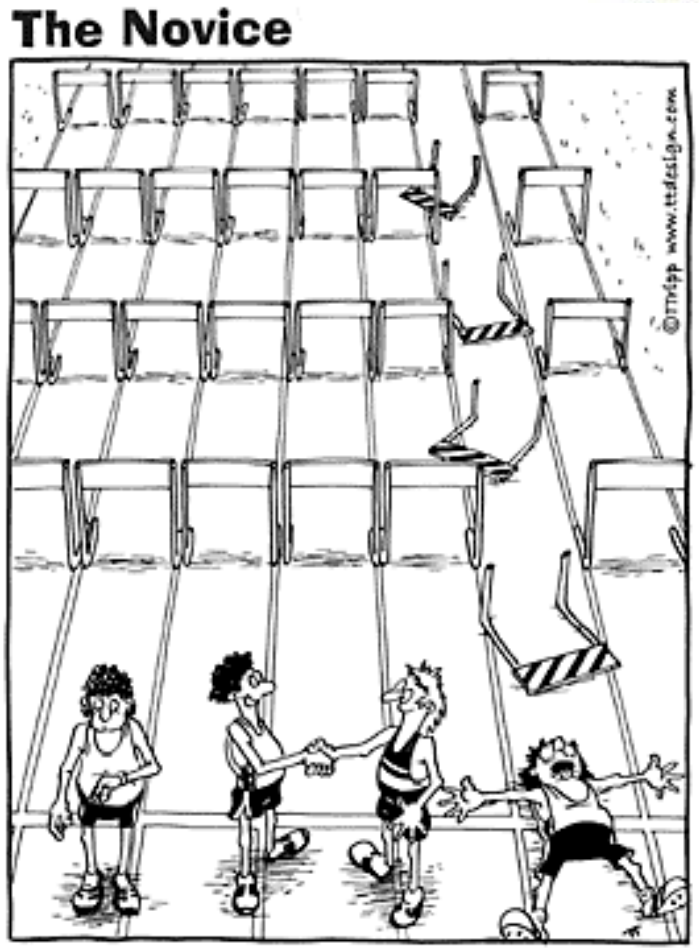
So, Now What?

What is UPK?

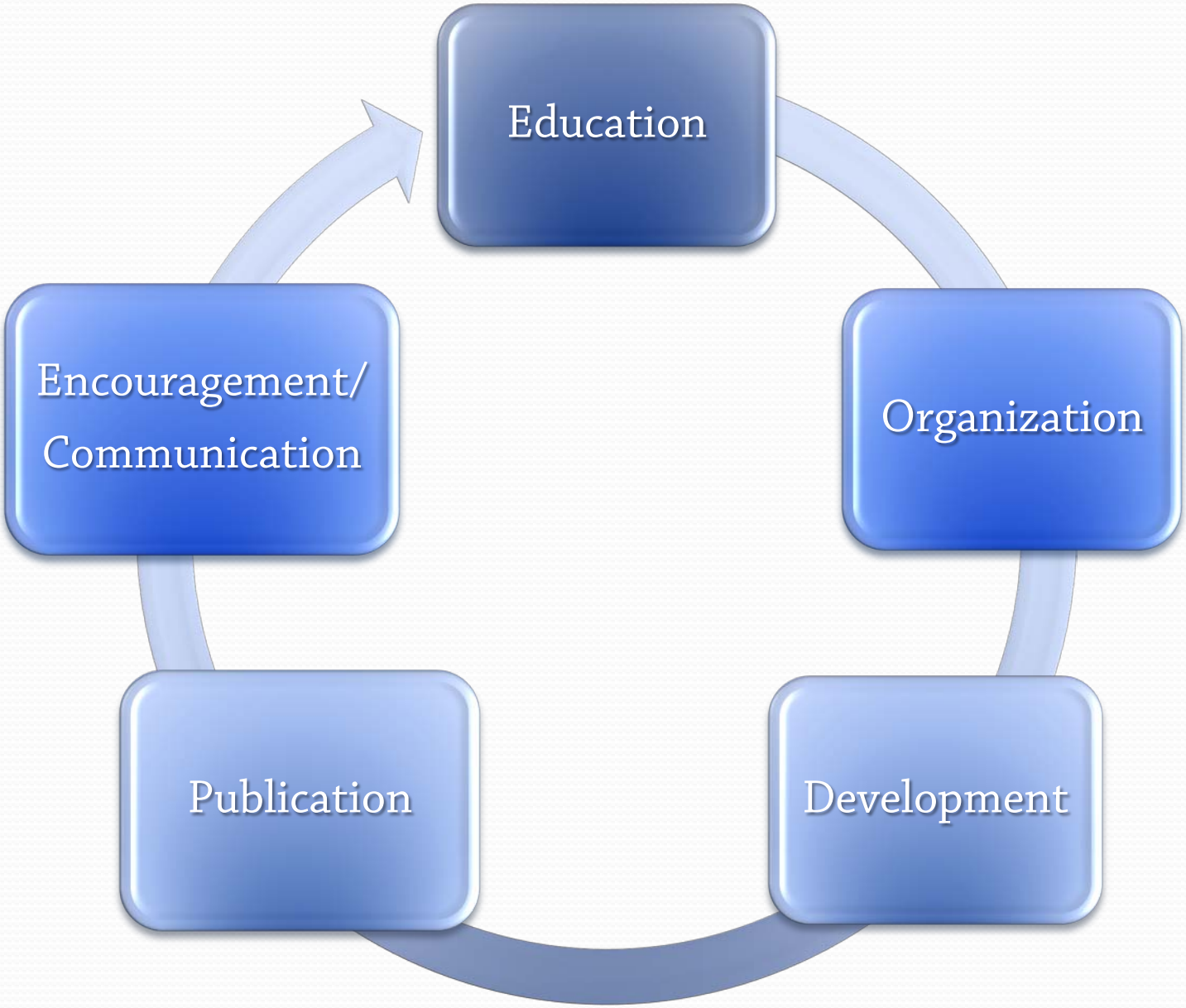
- Oracle **U**ser **P**roductivity **K**it
  - Software used to record and play simulated online processes
  - Produces multiple publishing formats ***simultaneously***:
    - Simulation modes (See It, Try It, Know It, Do It)
    - Printable guides
    - Testing documents

Acquisition of UPK

- Limited resources
- Limited developers
- Learning curve
- Limited licenses
- Large need



Our UPK Life Cycle



"There's a way
to do it better—
find it."

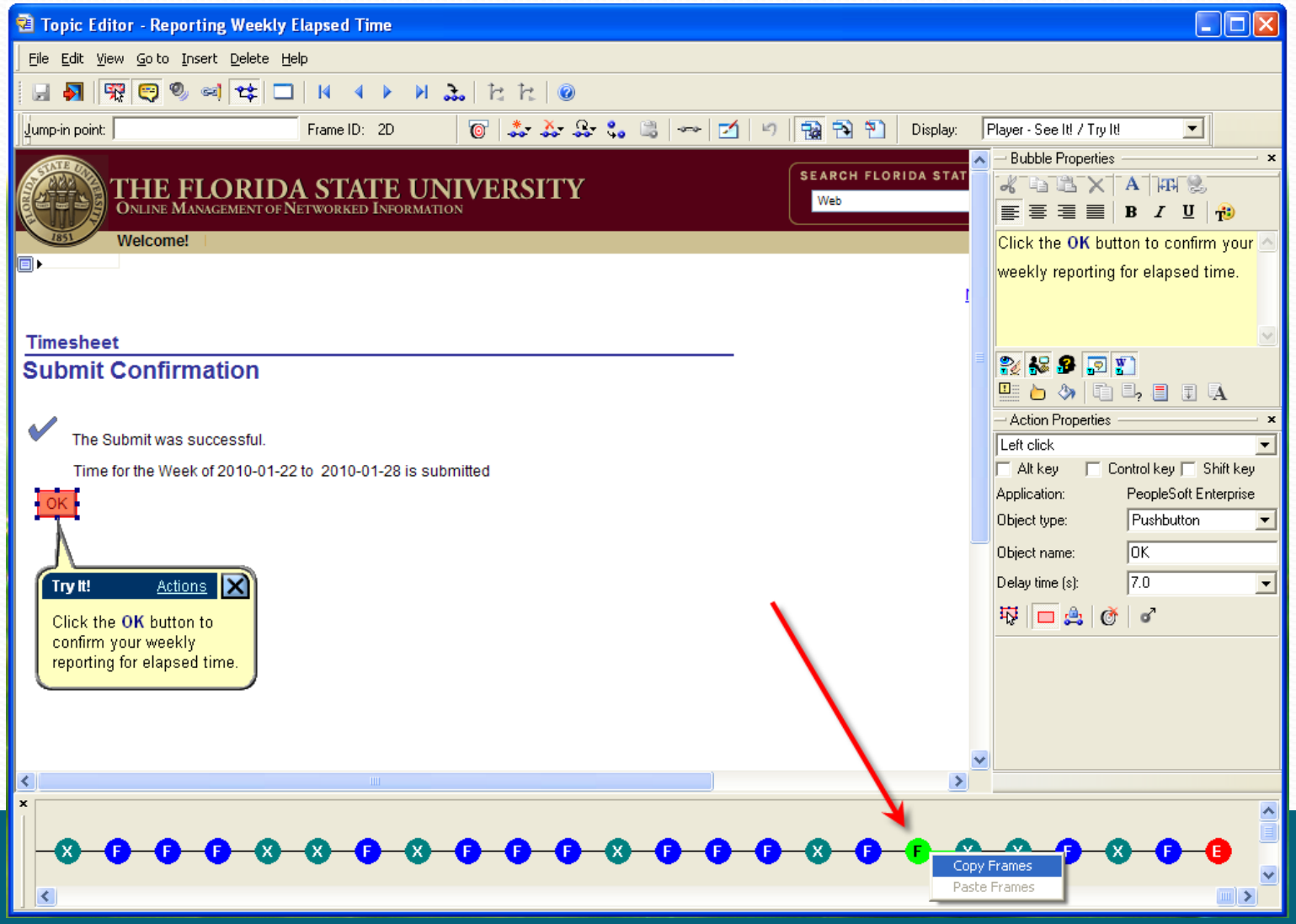
- Thomas Edison

Tips & Tricks

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

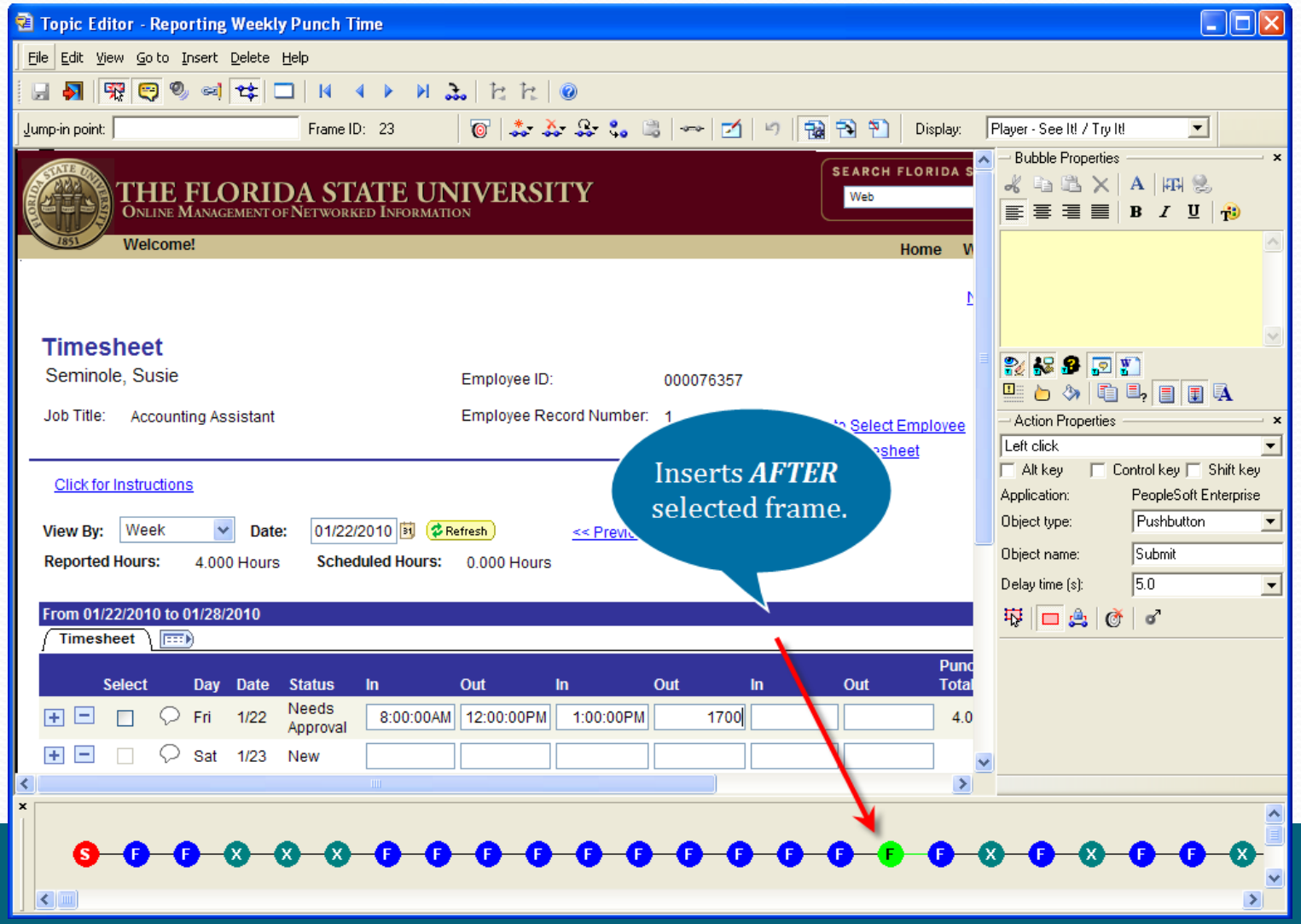
Copy & Paste

- Step 1 – Locate and copy frame



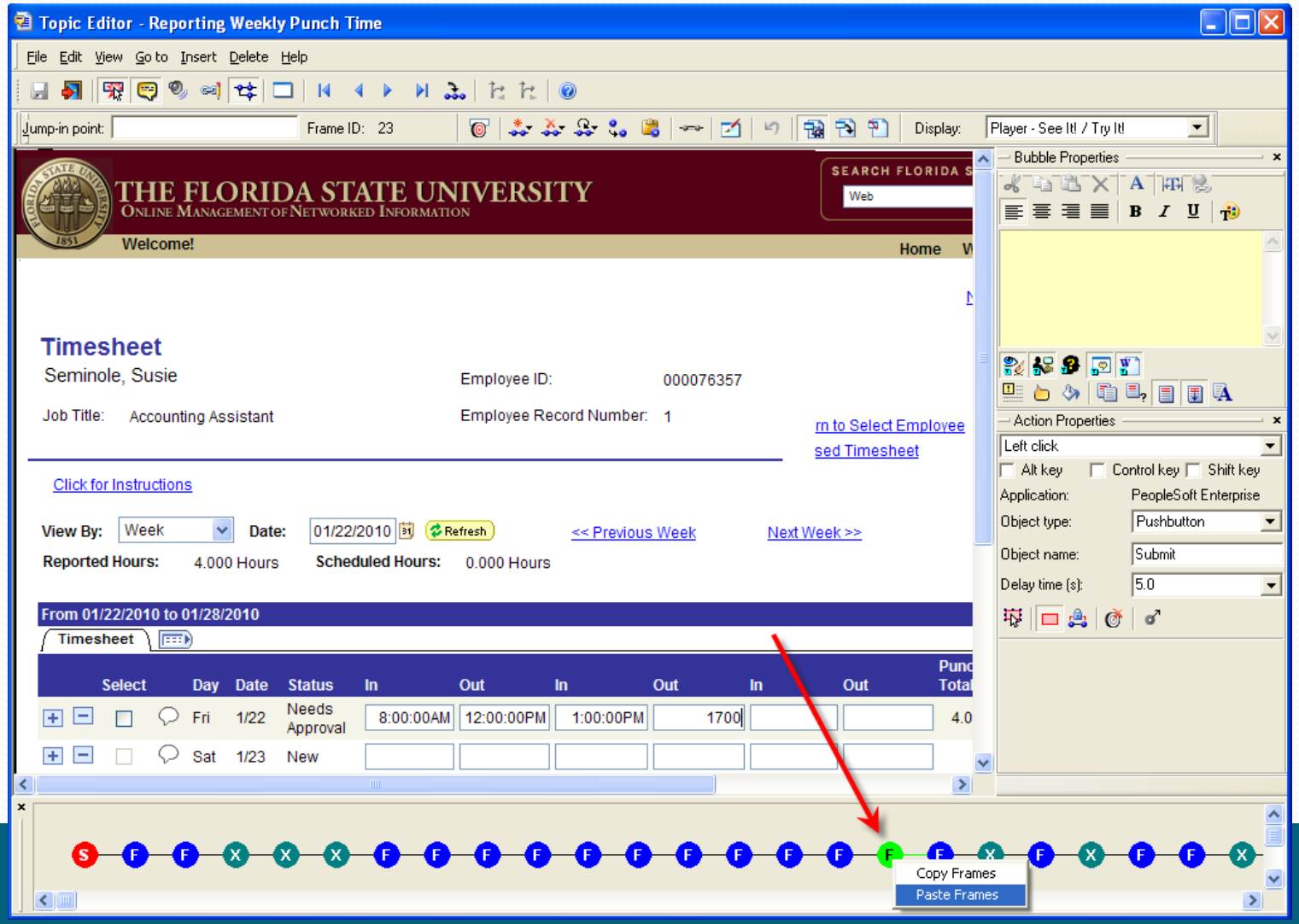
Copy & Paste

- Step 2 – Open new topic, locate placement



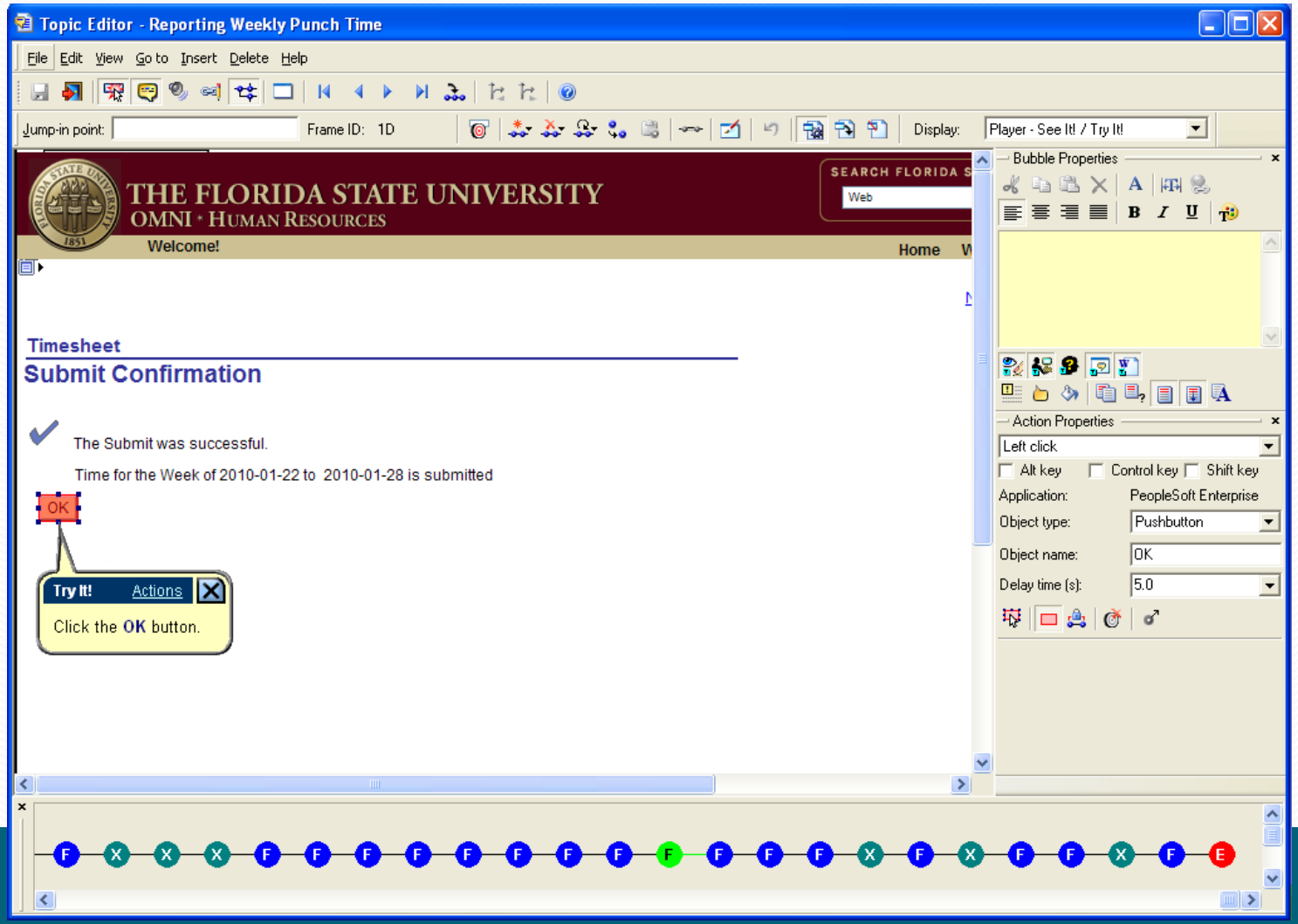
Copy & Paste

- Step 3 – Paste!

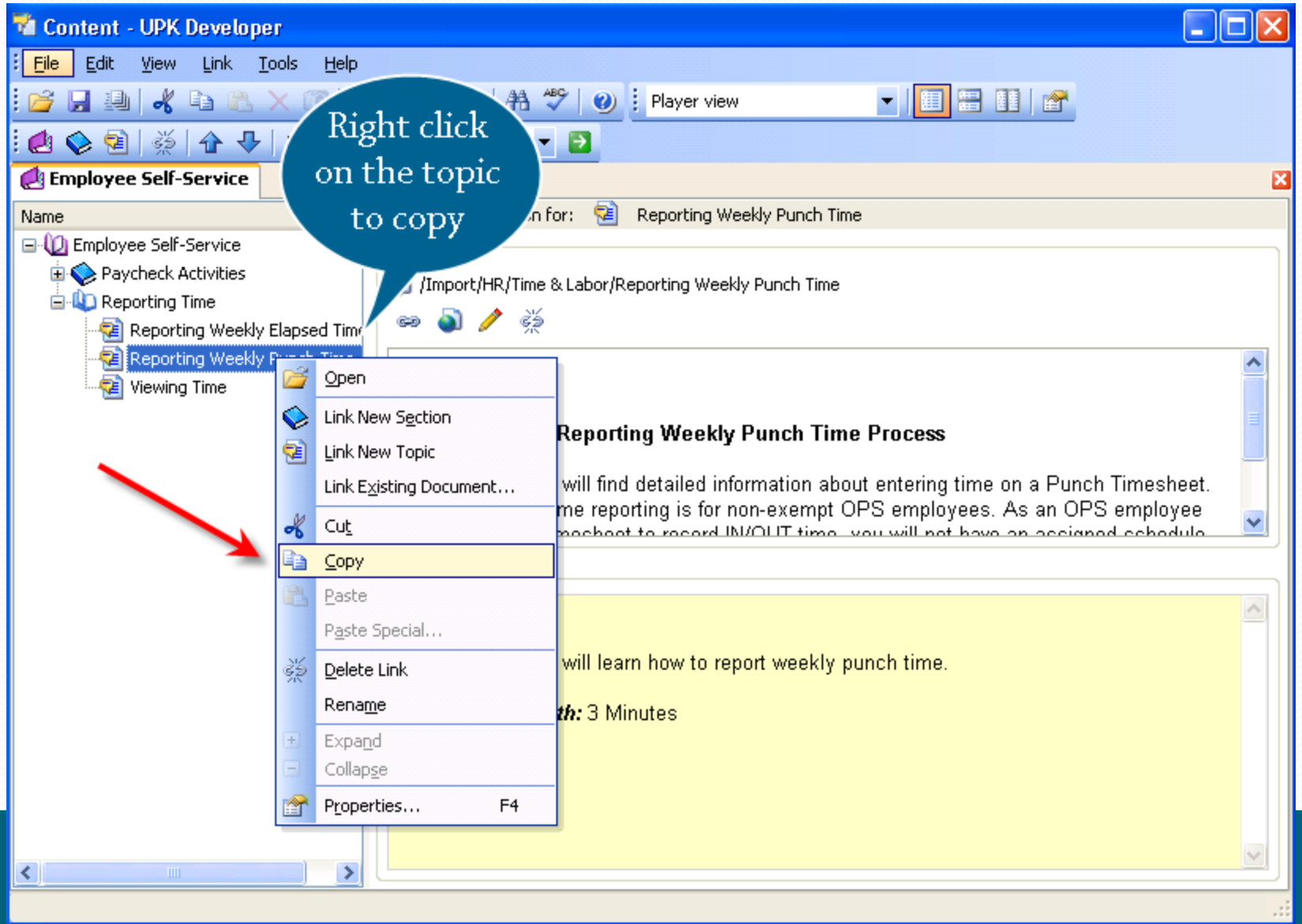


Copy & Paste

- Step 4 - Boom!



Copy & Paste Topics



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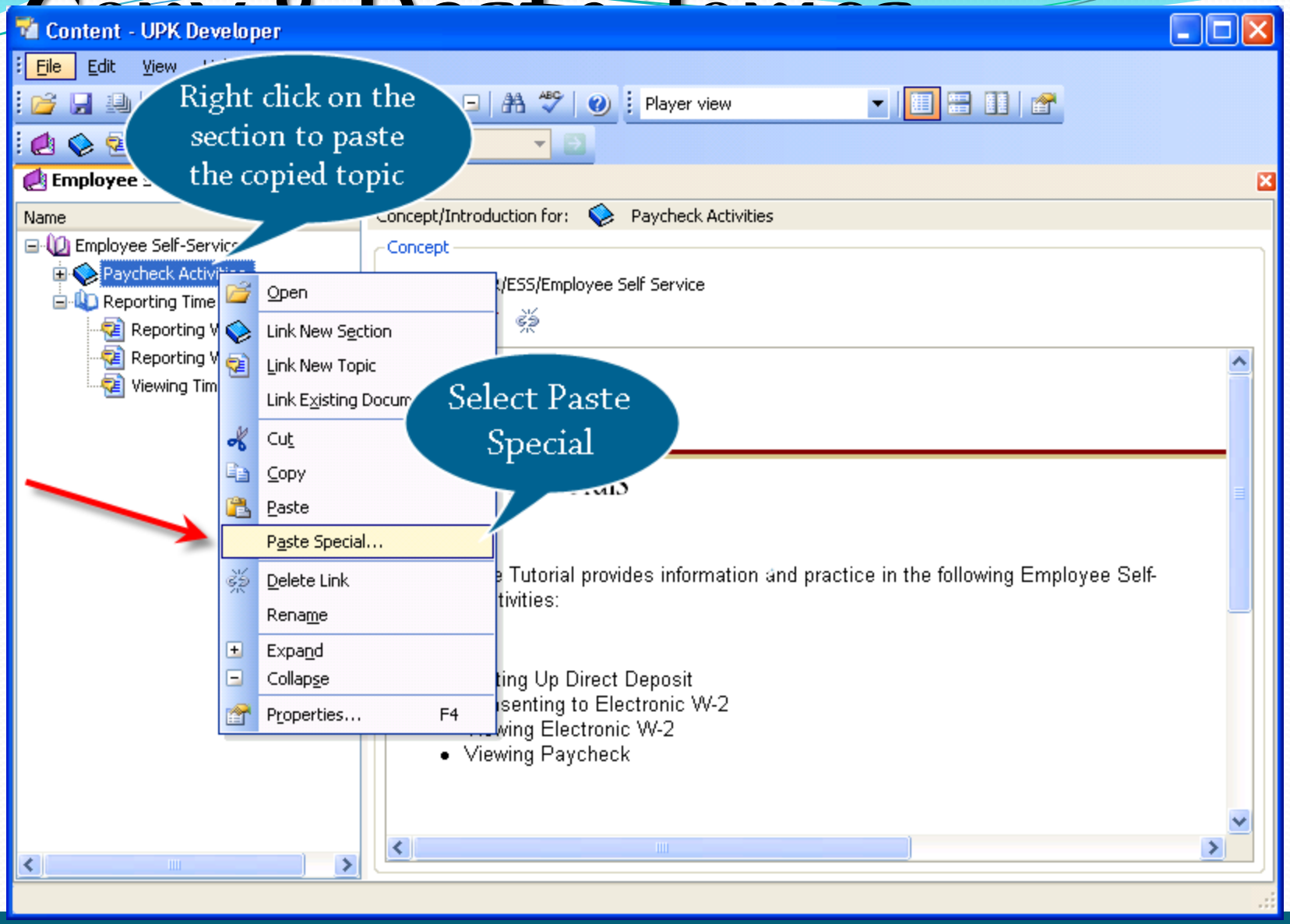

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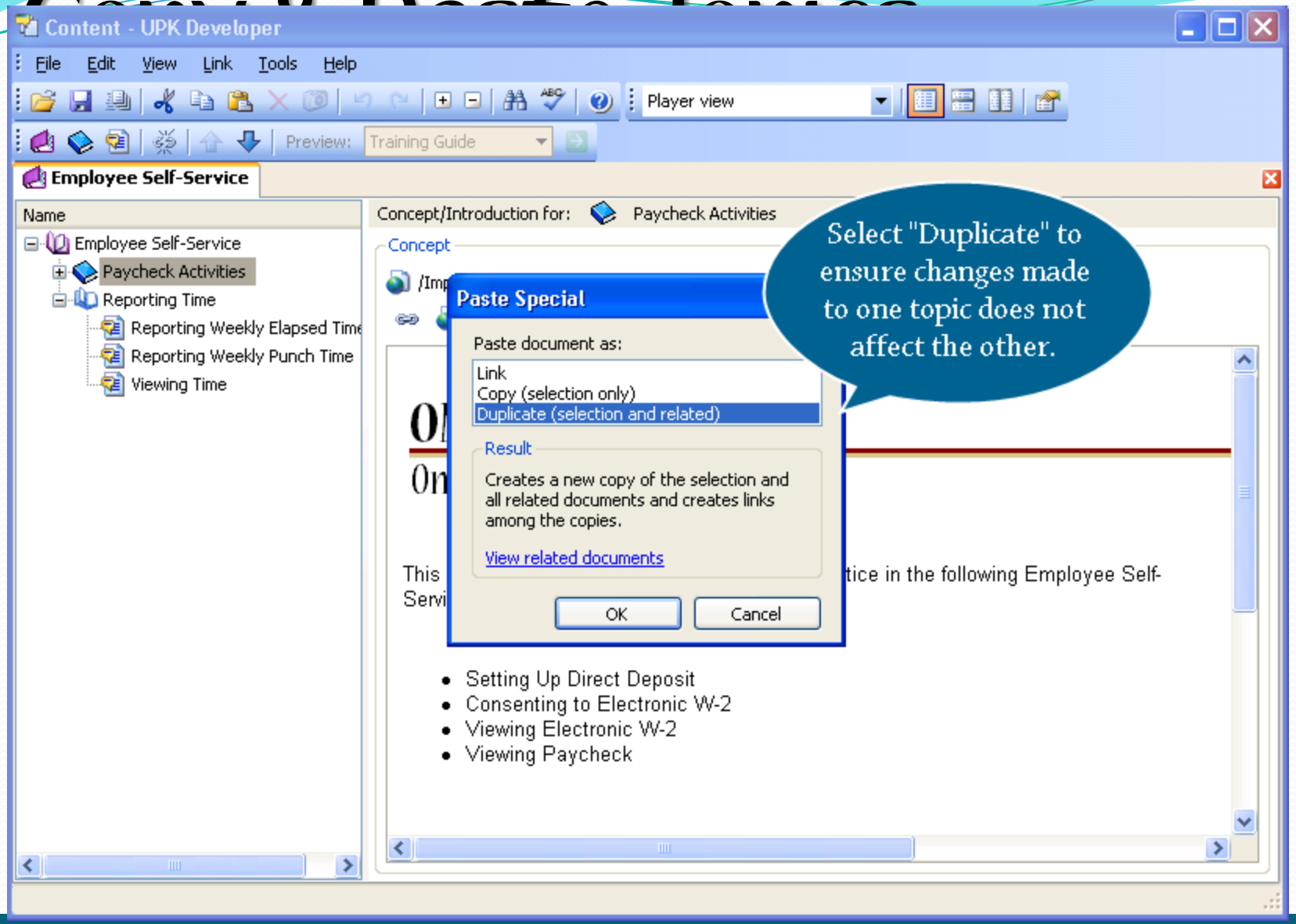

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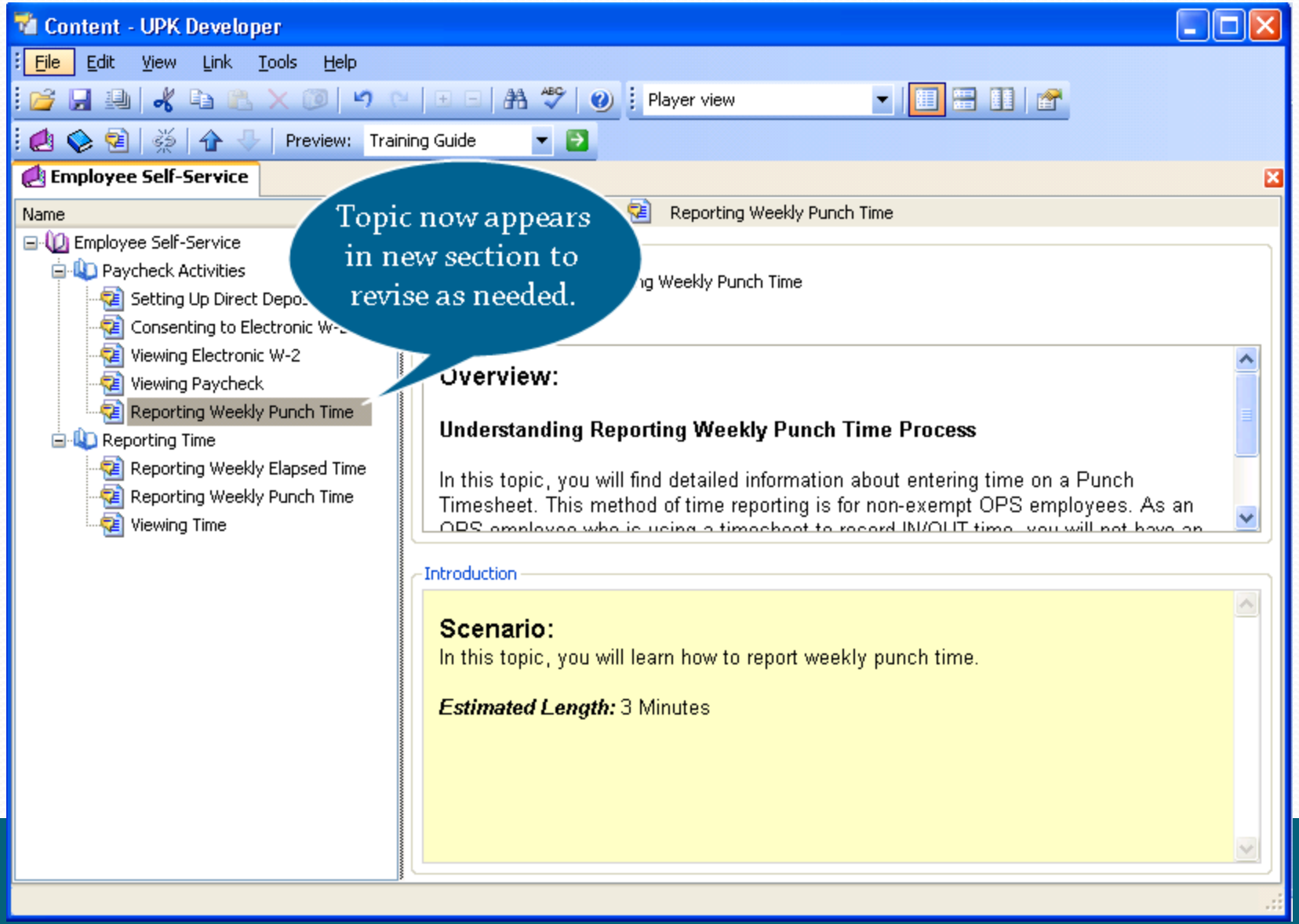
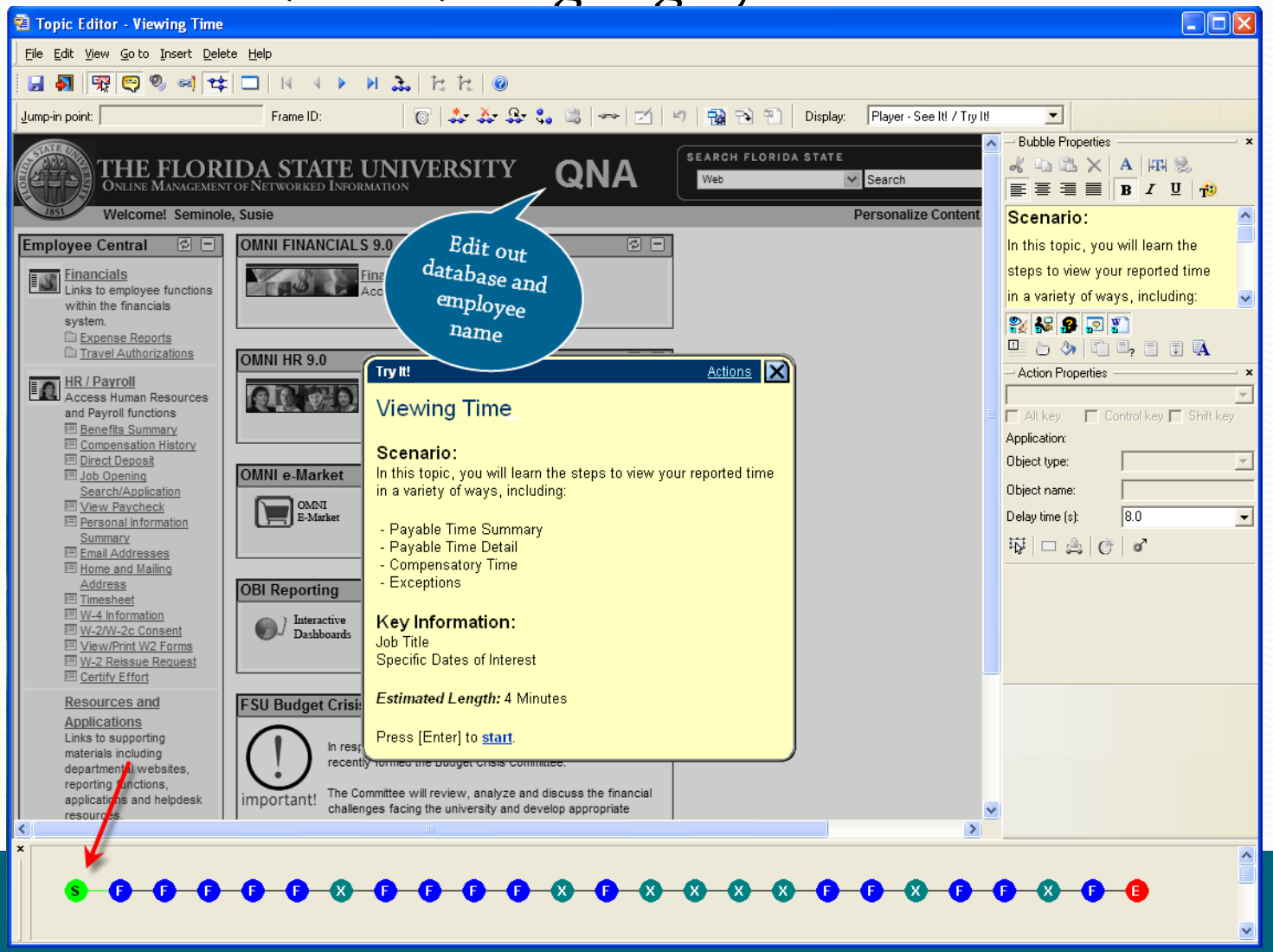


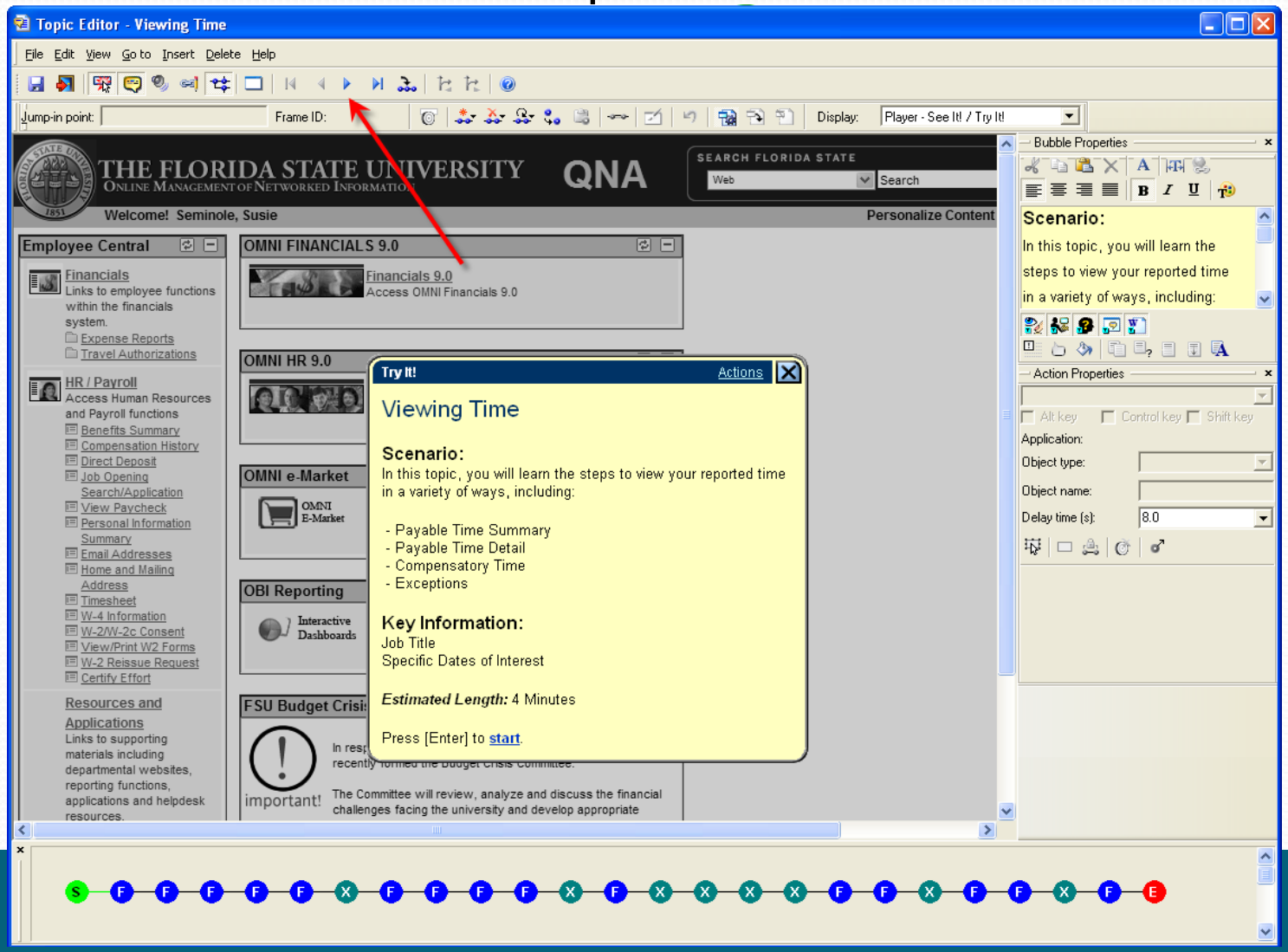
Start Frame Edit

- Edit/Paint/Snag-It grayed out frames



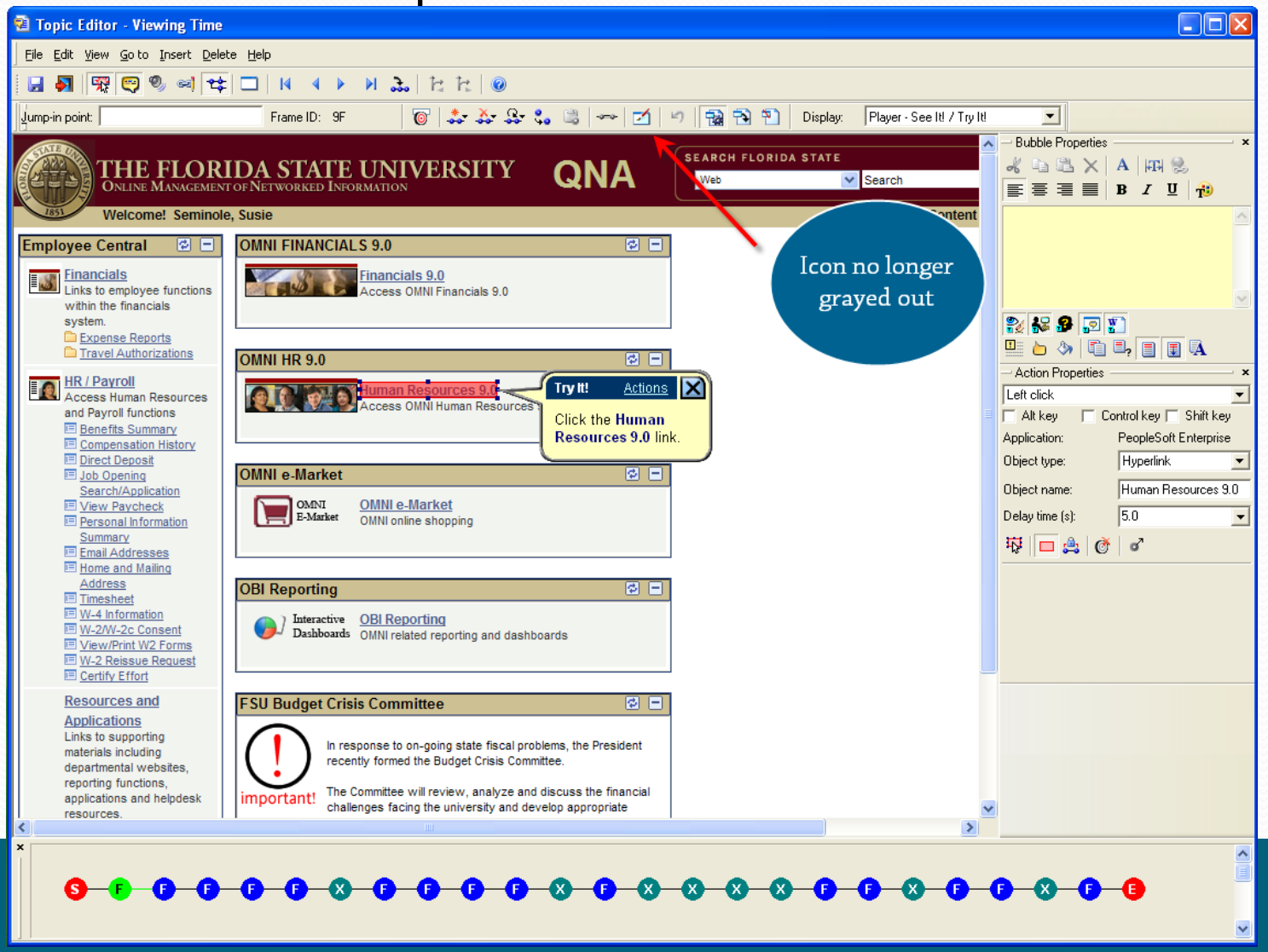
Start Frame Edit

- Start Frame – Step 1 Go to Next Frame



Start Frame Edit

- Step 2 – Edit screenshot

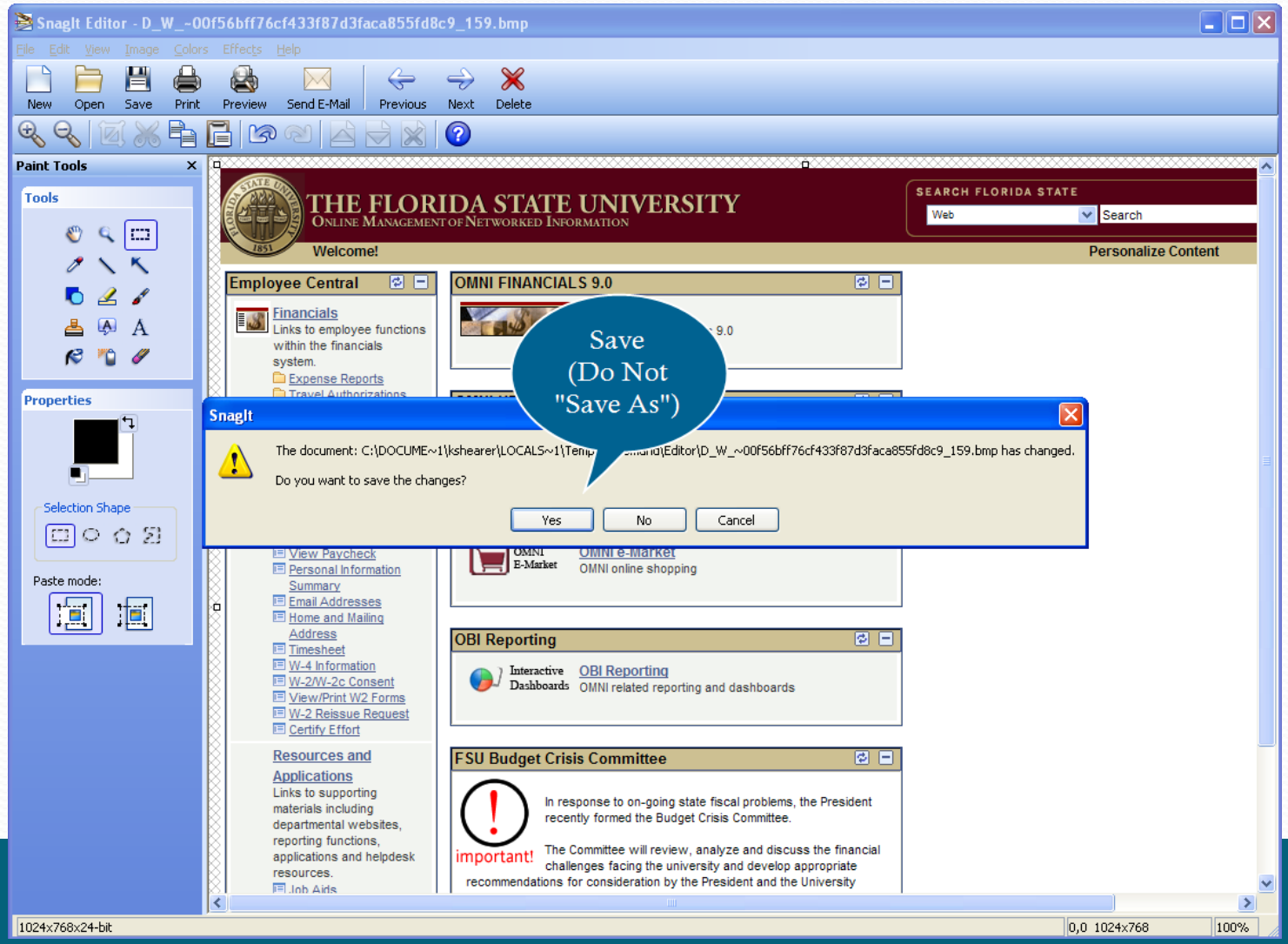


Start Frame Edit

- Step 3 – Edit as needed

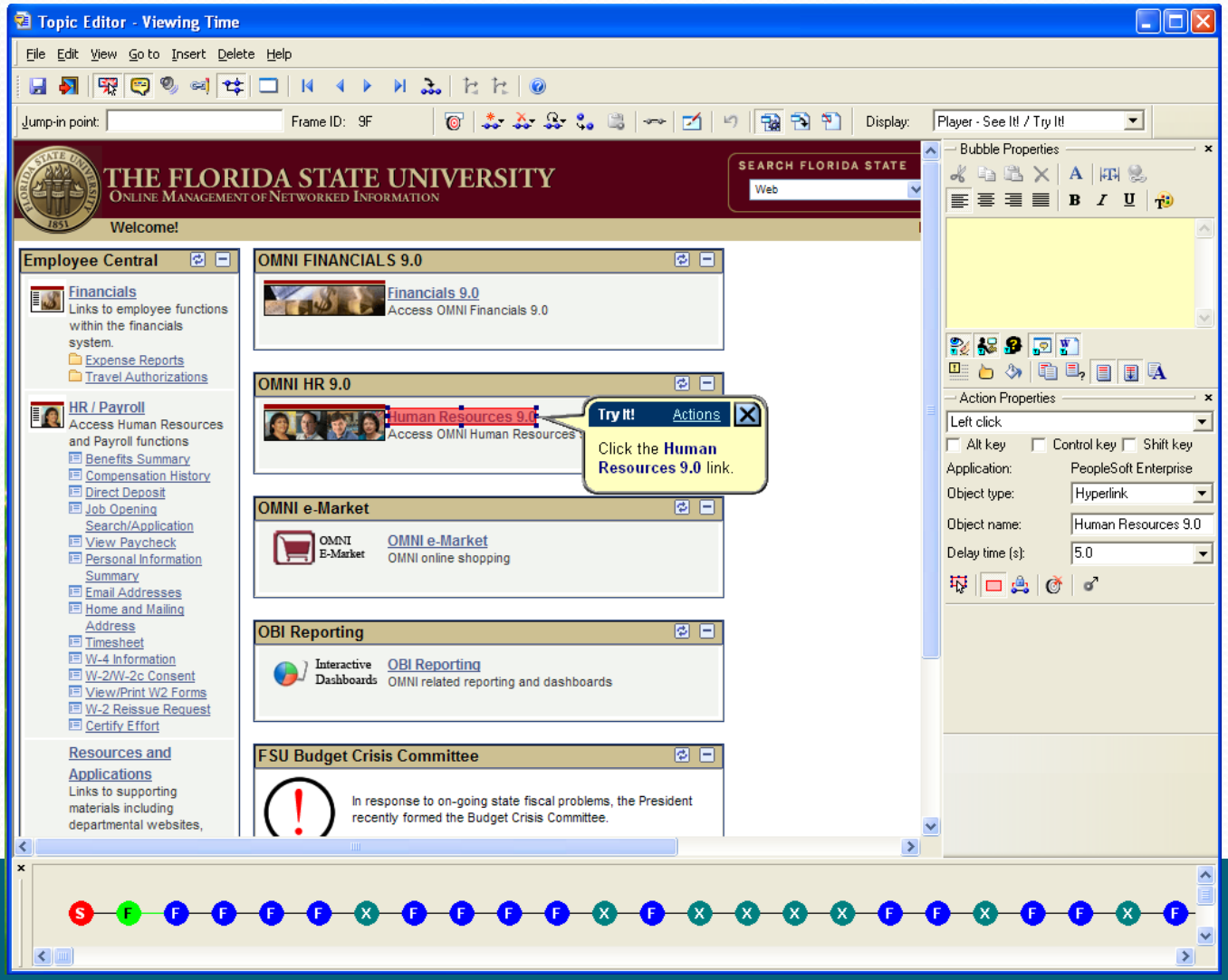
Start Frame Edit

- Step 4 – Save & Close

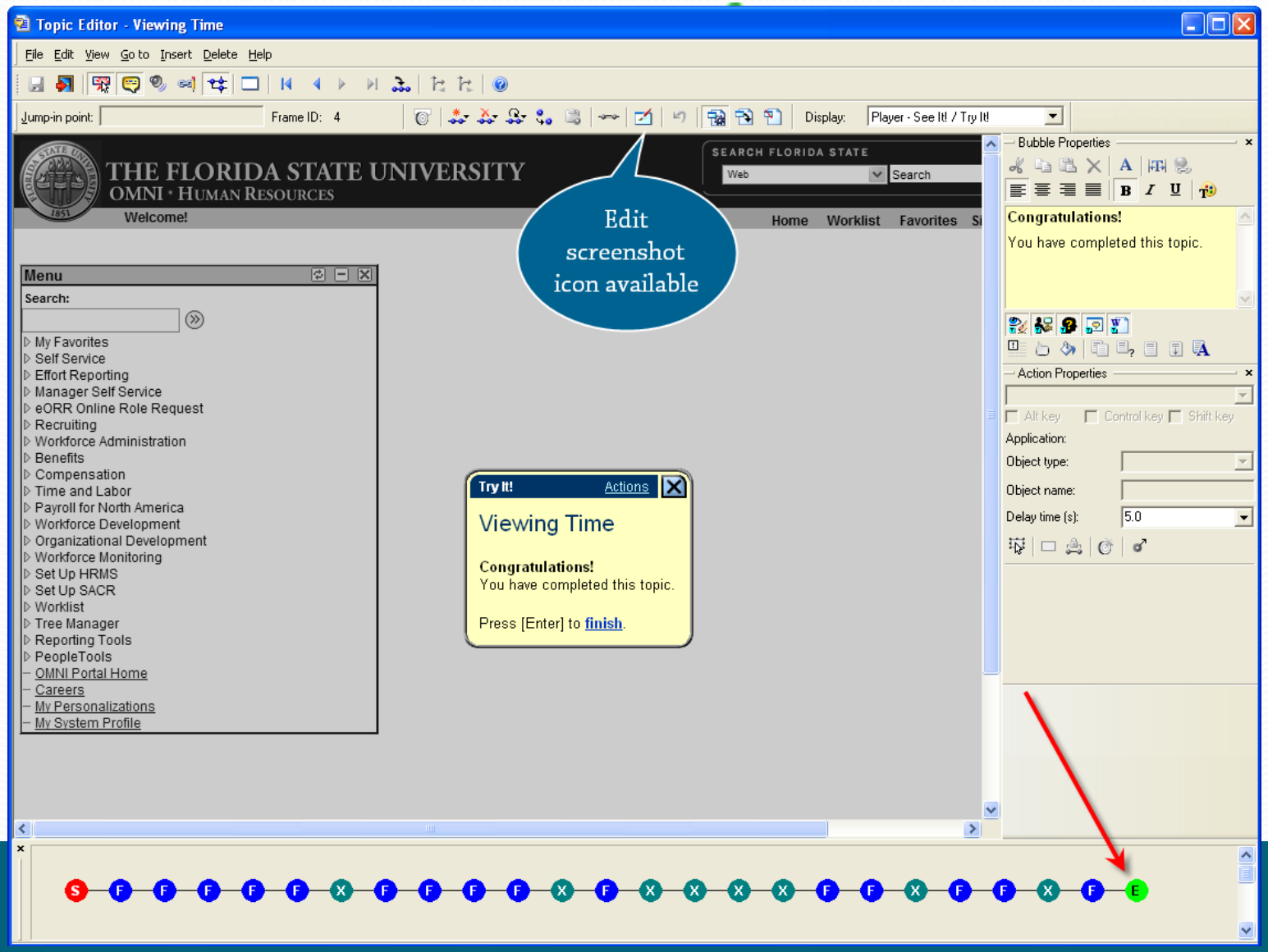


Start Frame Edit

- Step 5 – Automatically imports changes into UPK!



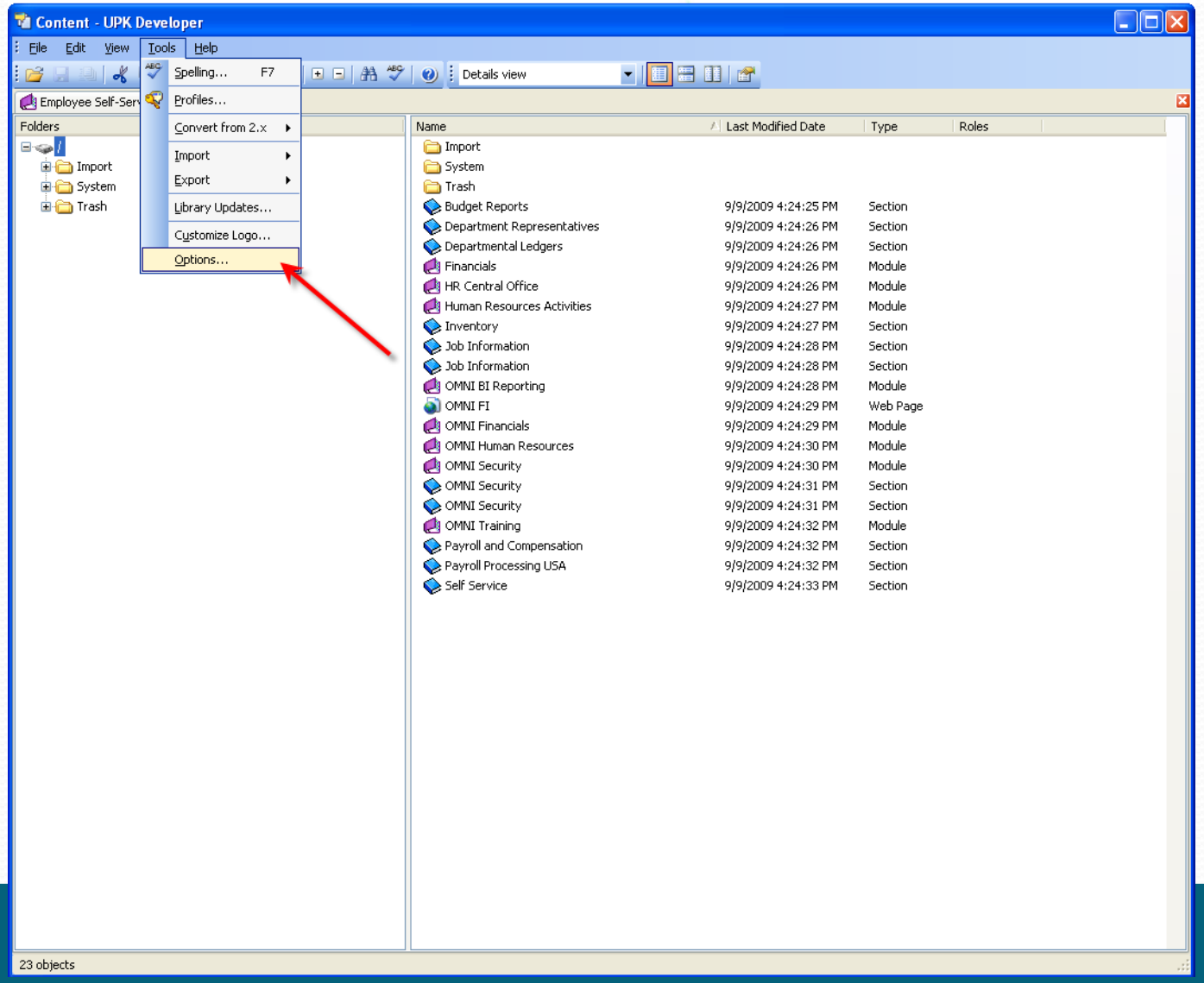
End Frame Edit



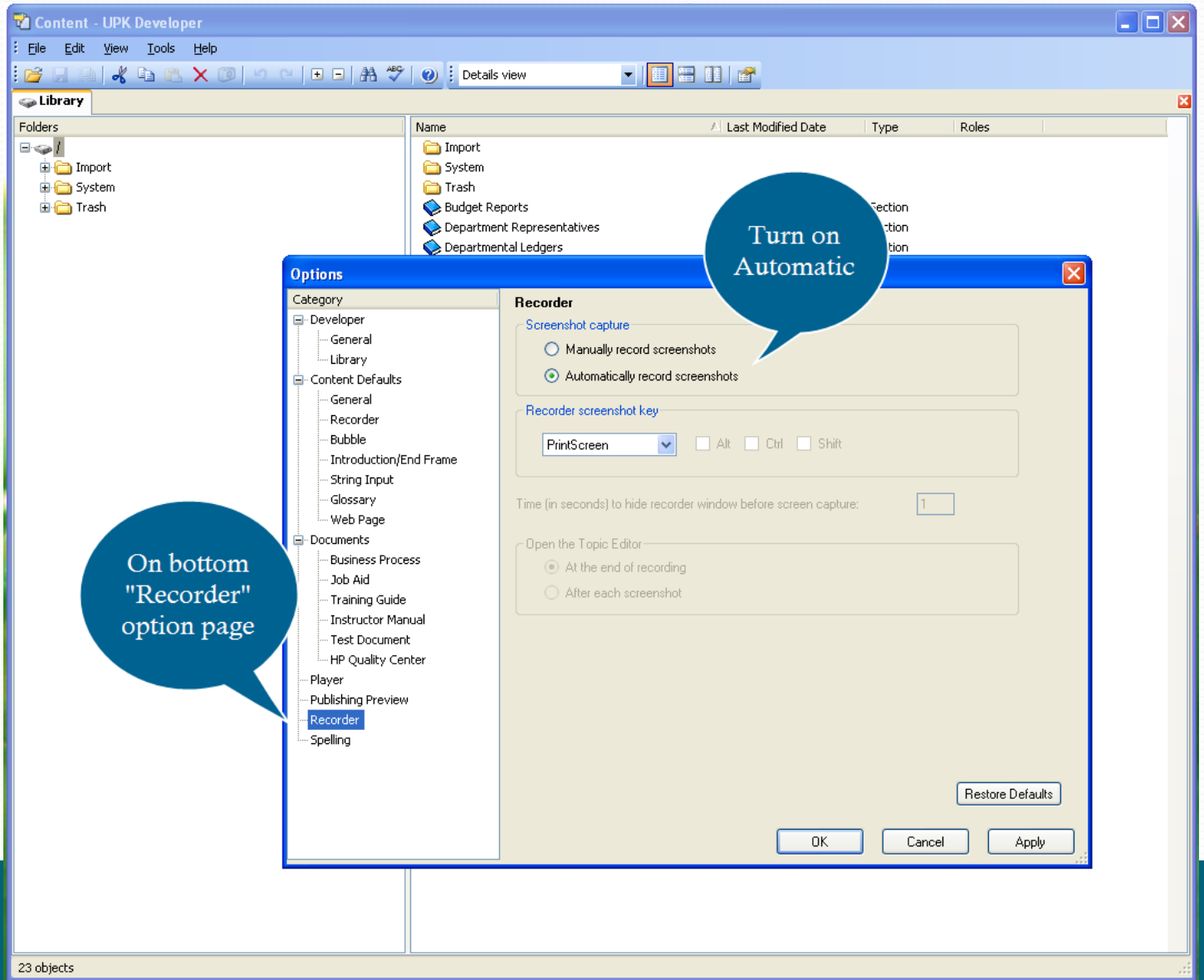
Automatic Recording

- Only available in 3.5 + versions
- Setup: Tools> Options> Recorder
- Record screens ***without*** pressing "PrintScreen" between each step!

Automatic Recording

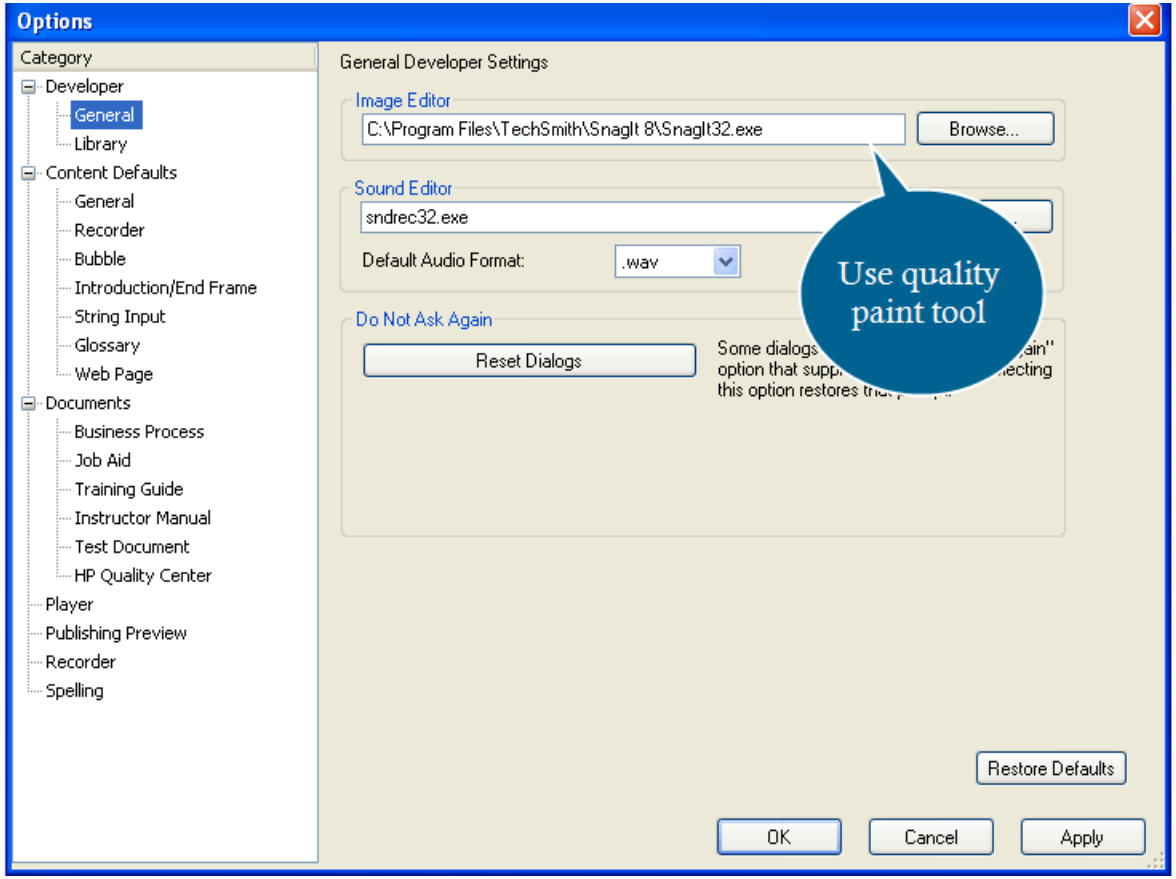


Automatic Recording



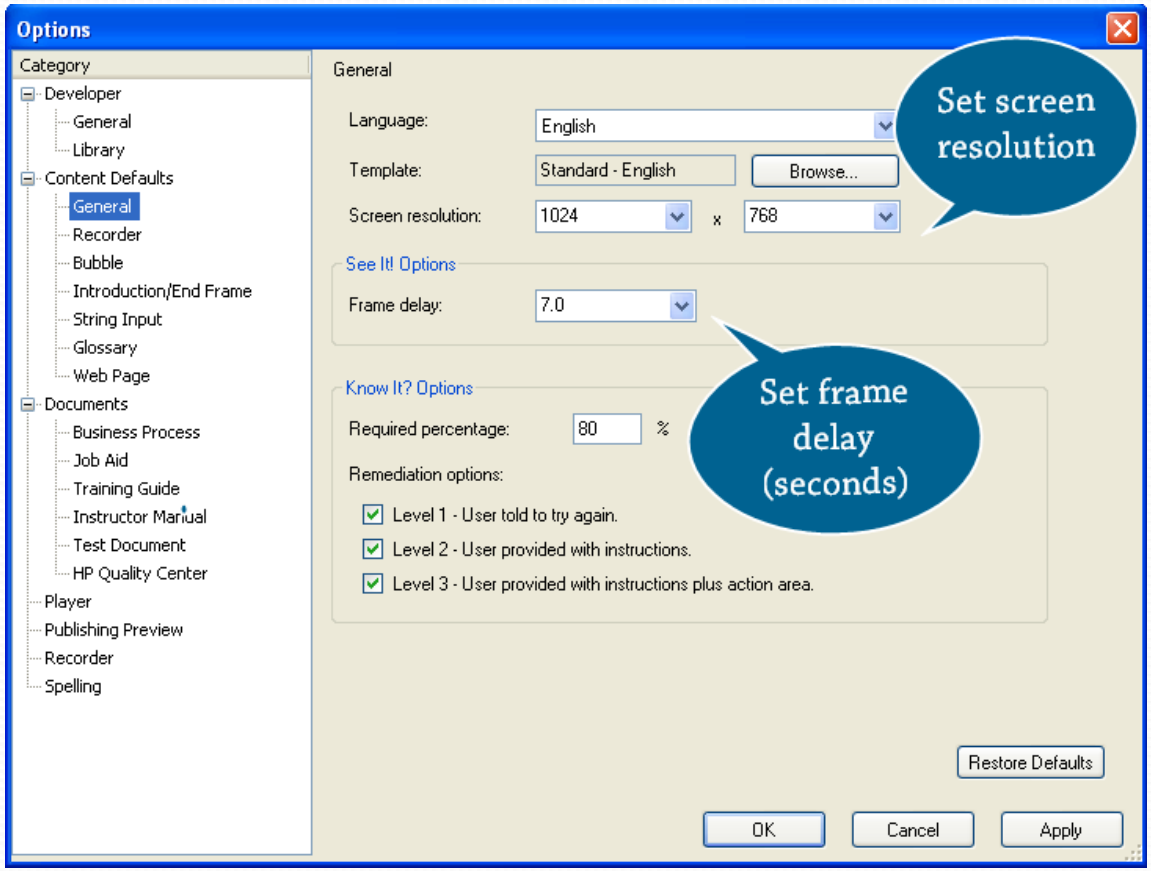
Options

- Developer
  - Image Editor
- Auto-populates Paint as Image Editor



Options

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



Time Savers

Before Recording

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

While Recording

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

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

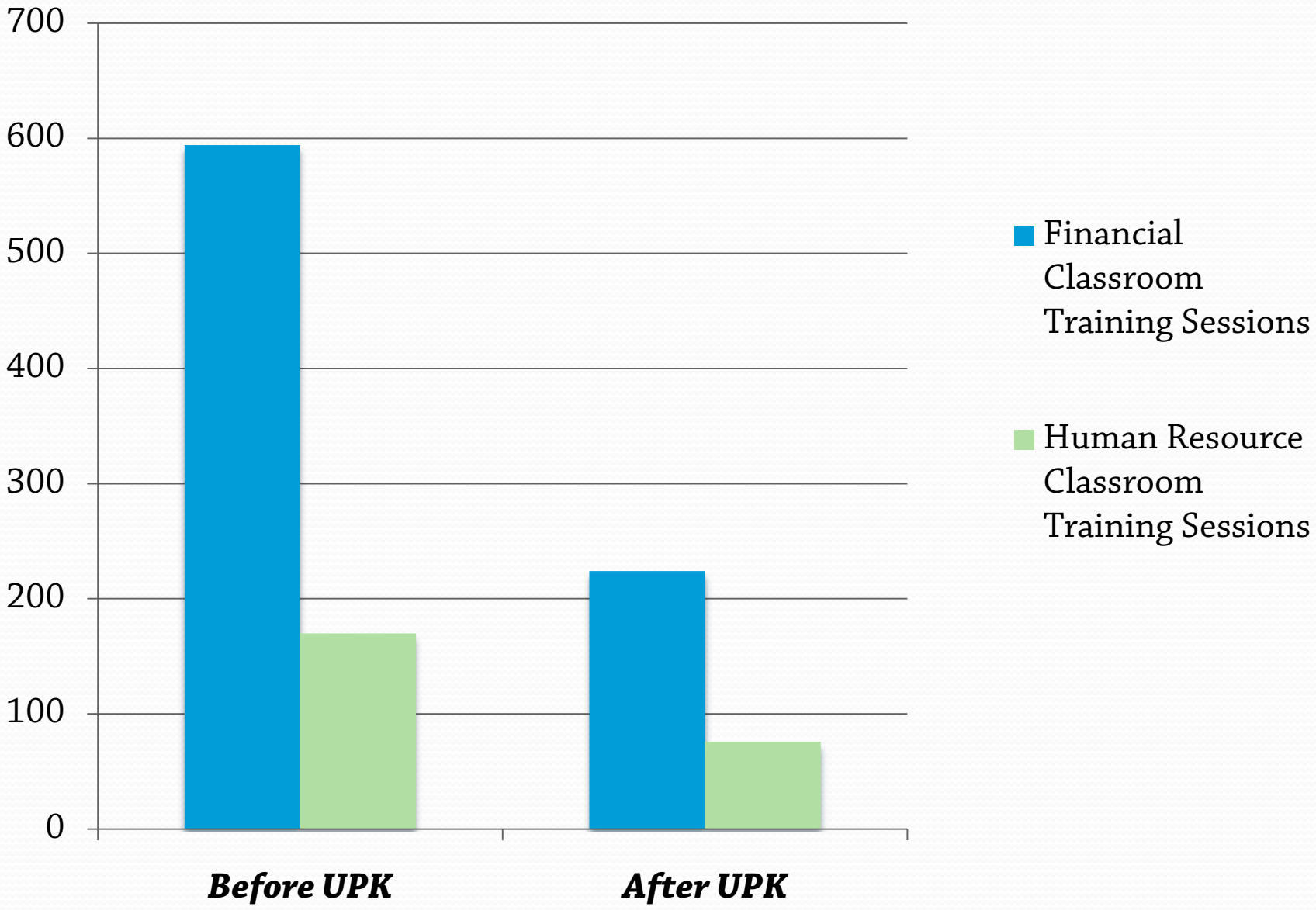
Benefits of UPK

- 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

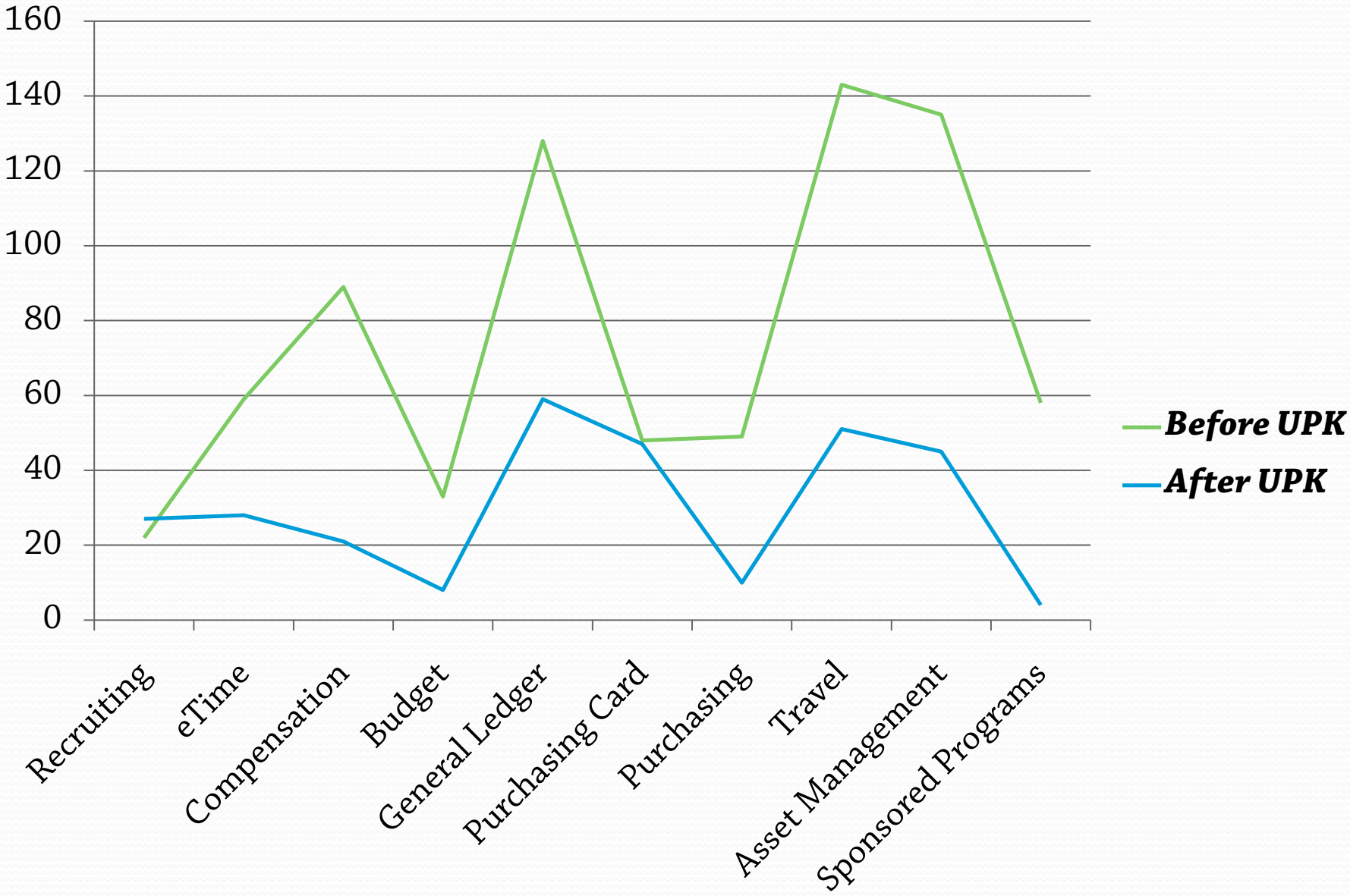
Benefits of UPK

- 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

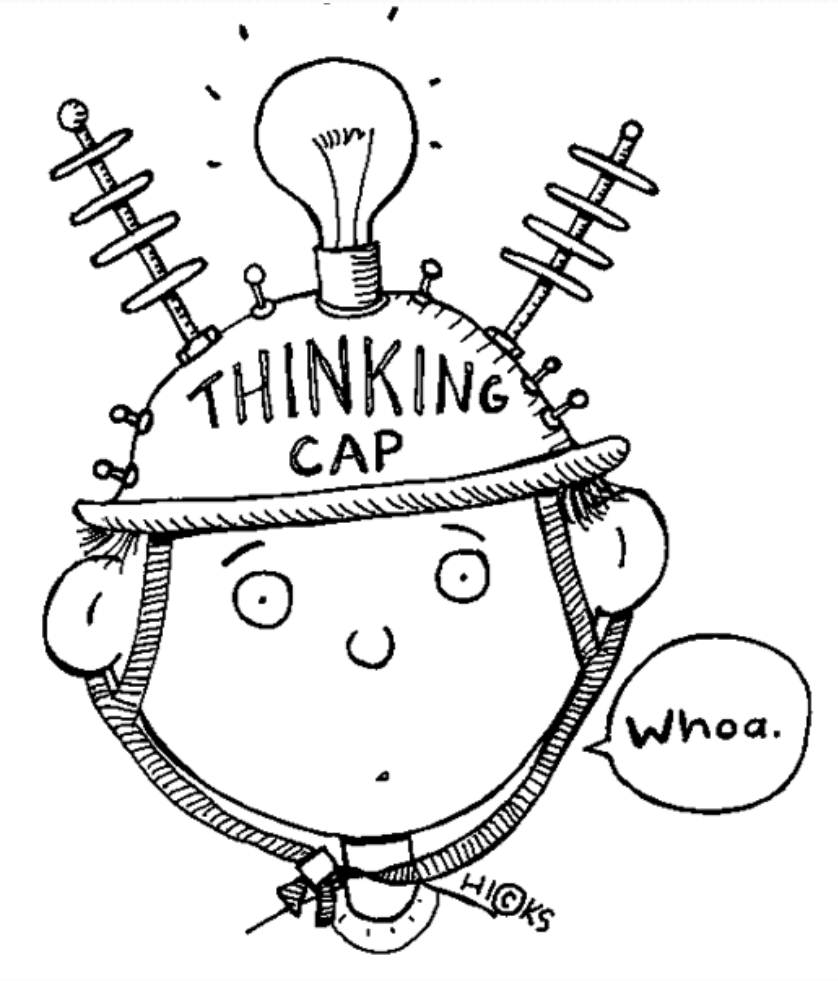
Classroom Training Attendance



Classroom Training Attendance



Consider This…



Things to Think About

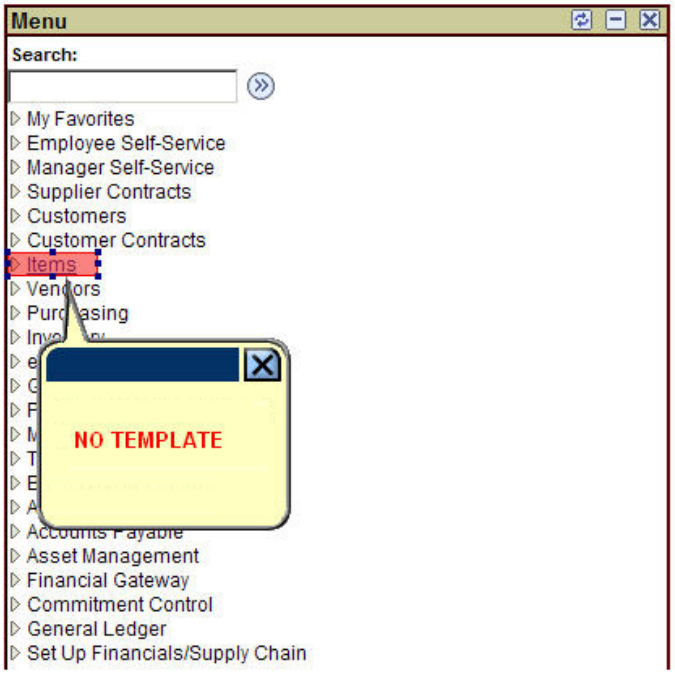
- Imbedded Logos
- Standards
- Content Development Workflow
- Centralized Training Website
  - UPK links
  - Printable step-by-step guides
  - Classroom training registration
  - Security roles information
  - Help ticketing system links
  - FAQ's
  - Contact Information

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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