

# Using the PeopleSoft User Productivity Kit (UPK)

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## Module Purpose

The purpose of this module is to provide instructors with an outline for teaching the PEOPLESOFT UPK tool.

## Module Objectives

At the conclusion of this module, participants will be able to:

- Identify the PEOPLESOFT UPK training hierarchy.
- Navigate through the PEOPLESOFT UPK.
- Identify the steps for using the PEOPLESOFT UPK browser-based Player.

## Module Contents

- Lesson 1 – What is the PEOPLESOFT UPK
- Lesson 2 – Navigation Through the PEOPLESOFT UPK
- Lesson 3 – Using the PEOPLESOFT UPK
- Lesson 4 – Printing from the PEOPLESOFT UPK

# Lesson 1 – What is the PeopleSoft User Productivity Kit?

Topics
Characteristics of the PeopleSoft UPK Training Hierarchy

## Introduction

The User Productivity Kit (UPK) is a highly interactive training tool that is tightly integrated with PeopleSoft processes, giving you a step-by-step walk-through of a specific process or procedure while in the PeopleSoft application.

The State Accounting Office (SAO) is using this tool to rollout end-user training to the agencies. In this lesson, you will learn about the characteristics of the kit and the training hierarchy.

## Explanation

### **Characteristics of the PeopleSoft UPK**

The PEOPLESOFT UPK has the following characteristics:

- Dynamic
- User-Friendly
- Versatile

## Transition

Let's explore each characteristic.

Characteristics	Descriptions
Dynamic	<p>You can do the following:</p> <ul style="list-style-type: none"> <li>• Determine when and where to deliver training.</li> <li>• Control the speed of the training <ul style="list-style-type: none"> <li>• As a Group</li> <li>• At Individual Workstations</li> </ul> </li> <li>• Decide which topics to review <ul style="list-style-type: none"> <li>• Work Area Specific or use for cross-Training</li> </ul> </li> </ul>
User-Friendly	<p>The training is developed in accordance with the SAO business processes. You are:</p> <ul style="list-style-type: none"> <li>• Guided on the screen in a step-by-step manner to complete a task.</li> </ul>
Versatile	<p>You will have access to the following training:</p> <ul style="list-style-type: none"> <li>• Text-based training documents and</li> <li>• A browser-based training medium.</li> <li>• Accessed via the internet.</li> </ul>

## Logging onto the Tool

You can access the UPK tool from the **Internet Explorer**  icon located on your desktop.

1. **Double-click** the icon on your desktop
2. Enter the URL (<http://saofnupk.state.ga.us>) at the **address field**, and press enter  
The PeopleSoft Financials UPK main screen will display.
3. Click the **title** that appears in the center of the screen

If you have a pop-up blocker, the player will not automatically open; you must disable your pop-ups before logging onto the tool.

We have now been introduced to PeopleSoft UPK, and learned how to log onto the tool. Let's discuss the navigation and training hierarchy next.

## **Lesson 1 – What is the PEOPLESOFT UPK? Key Learning Points**

<b>Question</b>	<b>Answer</b>
1. What are three characteristics of the PEOPLESOFT UPK?	Dynamic User-friendly Versatile
2. What are Modules?	Also known as titles, define the functional areas in which training is organized. Correlates to PeopleSoft modules.
3. True/False: Modules separate lessons by business processes?	False: Lessons separate modules by business processes.
4. Must you log onto the system every time you want to access the training?	No. You can either log into the PeopleSoft system and use the “Help” link or access the UPK tool directly by using the URL.

# Lesson 2 – Navigating the User Productivity Kit

## Topics

Overview of the Navigation Screen

Playback Modes

Jump-in Points

Training Mediums

## Introduction

The PeopleSoft UPK's main screen has various locations that allow you to access information. In this lesson, we will review the locations and discover their functionality.

Next, we will explore each location in detail.

The screenshot displays the PeopleSoft UPK main screen in a browser window. The address bar shows the URL: <http://saonupk.state.ga.us> - User Productivity Kit - PeopleSoft 8 - Microsoft Internet Explorer. The page features the SAO logo (State Accounting Office, Fiscal Leadership for Georgia) and a navigation menu on the left. The main content area is titled '2.2.1 Create a Voucher' and includes the following information:

- Created:** 03/30/2006
- Revised:**
- Job Aid:** Click [here](#) for Job Aid.
- Concept:**
  - The Voucher component in PeopleSoft Payables uses deferred processing. If you are adding a new voucher, you can use the fields on the add/search page for the component to populate the new voucher and reduce the amount of prompting and editing you need to do on the new voucher. This page is optional.
  - Regular Voucher style enables users to process standard invoices and invoices associated with a Purchase Order in the PeopleSoft Payables Module. Before adding a voucher, verify that the Vendor and Address currently exist in the Statewide Vendor file.
  - There are only three pages required for adding a voucher: the Invoice Information, Payments, and the Voucher Attribute page. The Voucher Attribute page is used to verify agency defaults.
  - On the Payments page under Payment Options select Hold Payment and Hold Reason, this will prevent the system from processing a payment for this voucher.
  - Once the voucher is saved two new pages will exist, Summary and Error Summary page.
- Business Process:** Click [here](#) for Business Process.

An **Introduction** section is also present, containing a **Scenario:** You have received an invoice from John Deere for supplies. You need to create a **Regular Voucher** for this invoice. You should put the **Payment on Hold** to prevent the check from creating. The vendor currently exists in the Statewide vendor file. Use vendor number 000000285.

## Explanation

### 1. Overview of the Navigation Screen

The four locations that we will explore include:

- Outline
- The Playback Mode
- Concept
- Introduction.

### The Training Hierarchy

The PeopleSoft UPK organizes the training material into three learning tiers. They are: modules, lessons and topics.

Tiers	Descriptions
Modules	Modules group the various functions within each track. For example, Accounts Payable is a module within the Basic track. Click on the + button of the Module to see the Lesson.
Lessons	Lessons further separate the modules by business processes.  For example: "Create Voucher Styles" is a lesson within the Accounts Payable module.
Topics	A topic is the lowest level in which the step-by-step training is placed. You will actually be playing a topic when you receive training.  For example: "Create a Voucher" is a topic within the "Create Voucher Styles" Lesson of the Accounts Payable Module.

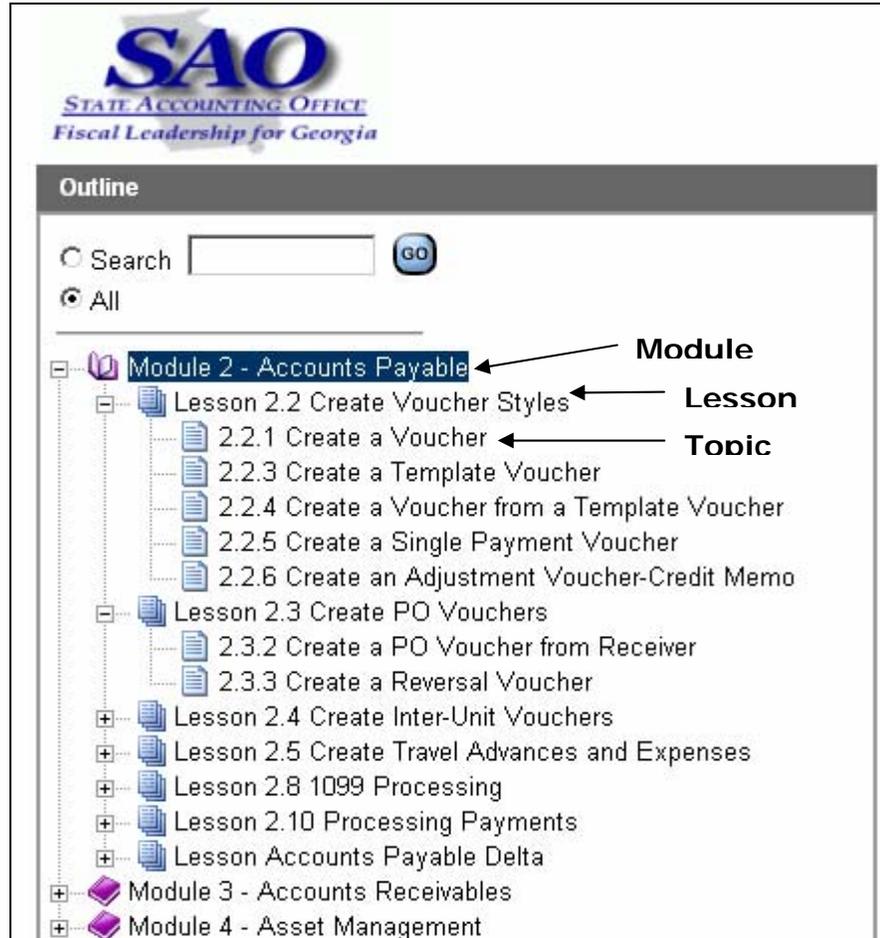
### The Playback Modes

There are four playback modes available to the learner. These modes include: *See It!*, *Try It!*, *Know It!* and *Do It!*



Note: Know It! Mode will not be utilized at Go-Live.

## Explanation



### Using the Search Feature

You can use the Search feature to locate a topic quickly instead of navigating the outline to locate the desired topic. After you enter a word or phrase, the Search feature performs a full-text search within the topics, including any pre-defined keywords, to locate all topics containing the indicated word.

After performing a search, you can redisplay the entire table of contents by clicking the **All** radio button that appears below the Search textbox.

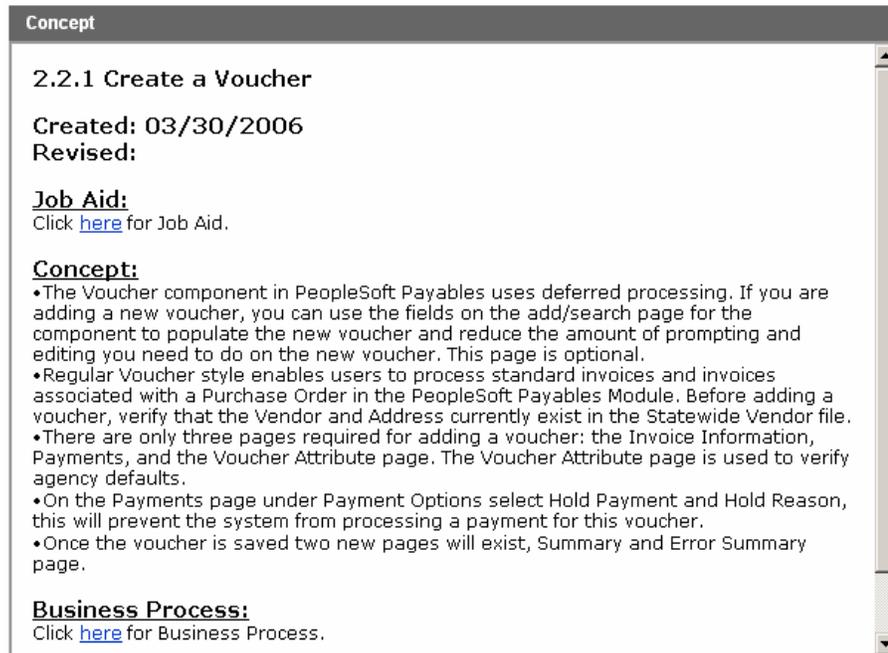
Valuable information on this transaction, houses Bus. Process and job aids for this transaction

These are the most commonly used transactions of the system

Transition

## Concept Pane

The Concept pane appears in the upper-right portion of the Player window and provides conceptual information regarding the selected topic. When you click on Module, Lesson, or topic an overview will display in the concept box.



The screenshot shows a window titled "Concept" with the following content:

**2.2.1 Create a Voucher**

Created: 03/30/2006  
Revised:

**Job Aid:**  
Click [here](#) for Job Aid.

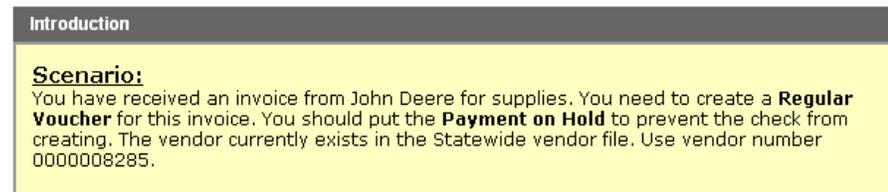
**Concept:**

- The Voucher component in PeopleSoft Payables uses deferred processing. If you are adding a new voucher, you can use the fields on the add/search page for the component to populate the new voucher and reduce the amount of prompting and editing you need to do on the new voucher. This page is optional.
- Regular Voucher style enables users to process standard invoices and invoices associated with a Purchase Order in the PeopleSoft Payables Module. Before adding a voucher, verify that the Vendor and Address currently exist in the Statewide Vendor file.
- There are only three pages required for adding a voucher: the Invoice Information, Payments, and the Voucher Attribute page. The Voucher Attribute page is used to verify agency defaults.
- On the Payments page under Payment Options select Hold Payment and Hold Reason, this will prevent the system from processing a payment for this voucher.
- Once the voucher is saved two new pages will exist, Summary and Error Summary page.

**Business Process:**  
Click [here](#) for Business Process.

## Introduction Pane

The Introduction box contains scenarios. It sets the stage for the transaction you are about to complete.



The screenshot shows a window titled "Introduction" with the following content:

**Scenario:**  
You have received an invoice from John Deere for supplies. You need to create a **Regular Voucher** for this invoice. You should put the **Payment on Hold** to prevent the check from creating. The vendor currently exists in the Statewide vendor file. Use vendor number 0000008285.

Now that you are familiar with the various locations on the PEOPLESFT UPK main screen, let's explore the playback modes in greater detail.

## Explanation

**We will not be using the Know It mode at this time**

## Online Help



## Note

### Playback Modes

In lesson 1, we explained that the PEOPLESOFT UPK is versatile, you can complete either text based or browser based training. In the browser based training, you can run the training using any of the following modes:

- *See It!*
- *Try It!*
- *Know It!*
- *Do It!*

Modes	Description
See It	Allows you to watch an on-screen, step-by-step demonstration of how to complete a task.
Try It	Lets you interact with PeopleSoft UPK to complete a task in a simulated environment.
Know It	Tests your knowledge about the topic you have learned.
Do It	Lets you complete the task with floating “pop-up” assistance.

Know it mode will not be used for the FN application at this time. We will activate it at a later date.

## Explanation

### Preferences and Help



The Preferences option is not available to end-users. It is used to set user options for accessing the player. If this link does not appear, your administrator has preset all preferences and has prevented them from being changed.

The help button displays the help window for the UPK player, and provides general information on how to open and operate the player.

## Transition

Next, we'll explore the PeopleSoft UPK Training Mediums.

## Explanation

### PeopleSoft UPK Training Mediums

There are two options for training available through the PeopleSoft UPK. They include:

- The Browser-Based Player
- Business Process documentation

## A Description of the Training Mediums

Training Option	Description
Browser-Based Player	<p>Provides training content through dynamic HTML pages that can only be opened with Internet Explorer.</p> <p>Access the browser-based player through: the training website</p>
Business Process Documentation	<p>Each module is published to a separate PDF document that includes:</p> <ul style="list-style-type: none"><li>• Conceptual information</li><li>• Procedures</li><li>• Relevant screen shots.</li></ul>

### Transition

In this lesson, you learned about the navigation screen, the playback modes, and the training mediums available. Next, you will learn how to use the various modes, points, and information blocks.

First, let's review the key learning points.

## Lesson 2 – Navigating the User Productivity Kit

### Key Learning Points

Question	Answer
1. What are the four locations on the PeopleSoft UPK navigation screen?	Playback mode Outline Concept Introduction
2. True/False: The See It mode allows you to watch an on-screen, step-by-step demonstration of how to complete a task?	True
3. What is the introduction location used for?	To view the scenario to be used for the topic.

## Lesson 3 – Using the User Productivity Kit

### Topics

The Browser-Based Player  
PEOPLESOFT UPK Content Infoblocks

#### Introduction

In this lesson, we will explore how to use the browser-based Player in greater detail.

#### Explanation

##### **The Browser-Based Player**

The Player allows you to learn while you work. Specifically, you will gain knowledge of the software functionality, complete with a conceptual understanding and hands-on experience, by learning how to use the program in a simulated environment while working with your own “live” data.

##### **How to Activate the PEOPLESOFT UPK Content**

The PEOPLESOFT UPK browser-based player content includes tutorials, bubble help, and interactive documentation. For our use, we will only use the following modes to work with the content:

<i>See It!</i>	<i>Try It!</i>	<i>Do It!</i>
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#### Transition

Next, we will explore how to activate the player by using each of the modes listed above.

## 1. Using the Mode

The *See It!* mode enables you to learn by watching an animated demonstration of tasks being performed in a simulated environment.

All required activities, such as moving the mouse and selecting menu items, are completed automatically.

### Characteristics of the *See It!* Mode

In the *See It!* mode, you can do the following:

- Pause Link
- Resume Link
- Enter Key
- Escape Key

Let's explore these characteristics in detail.

Function	Description
Timing	The default timing per frame is: 30 seconds, except in the <i>Explanation</i> frame. You advance by pressing the [Enter] key.
Pause Link	You can pause the demonstration at any time by clicking the <b>Pause</b> link in the bubble.
Resume Link	You would use the <b>Resume</b> link to continue the demonstration after a pause.
Enter Key	You can also advance the demonstration by pressing the <b>[Enter]</b> key.
Esc Key	You can exit the <i>See It</i> mode by pressing the <b>[Esc]</b> key or  button.

## Transition

## Explanation

**You may also want to print the business process document for reference while you follow along in the player modes.**

Now, let's explore the *Try It!* mode in detail.

## 2. Using the **Try It!** Mode

The *Try It!* mode enables you to learn interactively by prompting you for the necessary mouse clicks or keystrokes to complete tasks in a simulated environment.

### Characteristics of the *Try It!* Mode

In the Try It mode, you can do the following:

- Control the Timing [Enter] Key
- Action Link
- Escape Key

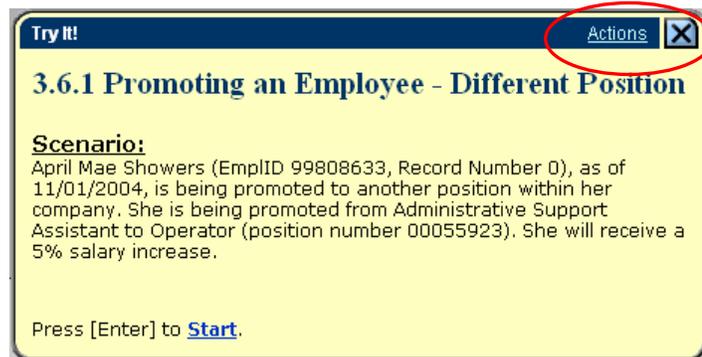
Red is a required field

3-digit fill option here

you get a hint if you do something incorrectly

Function	Description
Timing	In the <i>Try It</i> mode, you can press the <b>[Enter]</b> key to advance and control the timing of the topic.
Action Link	You can stop the demonstration by clicking the <b>Action</b> link in the bubble and selecting the appropriate option.  You can also go back one frame, go ahead one frame or open the concept pane from the action link.
Esc Key	You can exit <i>Try It</i> mode by pressing the <b>[Esc]</b> key or  button.

See below for an example of how the *Try It* mode works.



Transition

Let's review the *Do It* mode.

### 3. Using the Mode

With *Do It!* mode, UPK guides you through a task while you are in the PeopleSoft application. By clicking on the Help link within PeopleSoft, a “pop-up” window opens with the UPK menu available to choose from. Select the topic you wish to view and it will allow you to go through the topic while you are still in your active PeopleSoft session.

#### Characteristics of the *Do It!* Mode

- Step-by-step instructions for completing the task.
- Next Step arrow button
- Action box

We strongly recommend that you learn the topic in *See It!* and *Try It!* modes before attempting it in *Do It!* mode.

#### Transition

We’ve explored the *See It!* *Try It!* and *Do It!* Modes. Now you’ll learn about the Jump-in Points and Infoblocks.

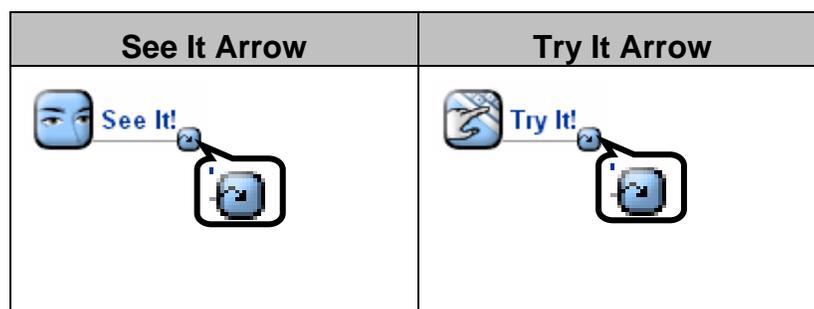
## Explanation

Will not be programmed heavily at Upgrade go-live.

### Using Jump In Points

An arrow icon appears on the *See It!* and *Try It!* buttons in the browser-based player window. This allows you to jump into a topic.

See below for an example of how the arrow icon appears on the *See It* and *Try It* buttons.



#### Note

The arrow is not available on the  *Know It?* mode.

The Jump-in Points are links to various actions within a topic, allowing you to start a topic at a point other than the beginning.



#### Note

Jump-in Points are helpful when you need to learn only a portion of a task, particularly for topics with many steps.

When a Jump-In Point is NOT Available?

If no Jump-in Points were created, the <Topic Name> window contains the **Beginning of Topic** link only. By default, the Beginning of Topic link appears in all <Topic Name> windows.



#### Question

Jump in points have been programmed sparingly for the initial upgrade.

## Transition

You've learned about the Jump-in Points, next you will learn about Infoblocks and their various options.

## Explanation

### **Infoblocks**

While *See It!*, *Try It!* and *Do It!* modes allow you to work through tasks, you may need additional information about the task that is not tied to a particular action. You can find additional information in Infoblocks.

#### Characteristics of Infoblocks

The following are characteristics of Infoblocks:

- Are normally viewed in the form of a “bubble”.
- Infoblocks may be associated with an outline item (i.e., a module, lesson or topic), or a particular screen.
- They may contain conceptual information presented in plain text or in a bitmap.
- Infoblocks can launch particular documents or websites.



### **Note**

We have placed infoblocks throughout the training, they will be located in:

Concept pane

Text Bubbles

Action panes

**Explanation**

**Using the Action box**

In the *Try It!* and *Do It!* modes, you may have the opportunity to display Actions or Paths within a topic.

**Definition**

Action boxes allow you to use the click-thru function. Click thru screens allow you to control how quickly you review the tutorial or lesson.

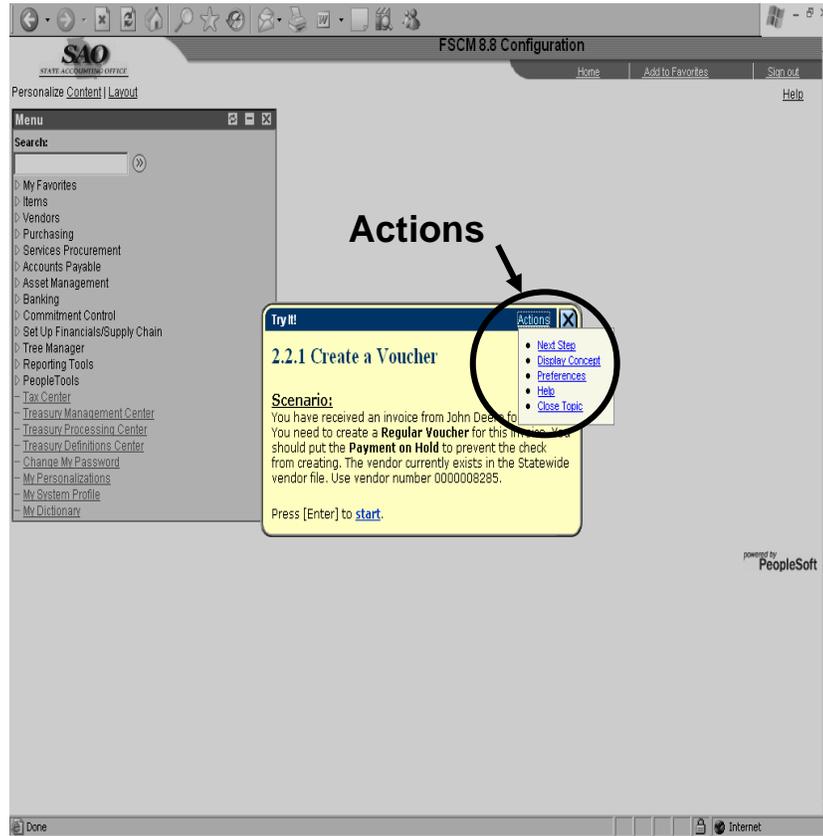
For Example: By pressing the **Enter** key you can click through the steps without waiting.

**Explanation**

**The Benefit of Using an Action box**

The benefit of using the Actions is that you can accomplish a task more efficiently.

See below for an example of where to find the Action link.



## Transition

We have completed Lesson 3 on Using the PEOPLESFT UPK. Now, let's review what you have learned.

## Lesson 3 – Using the User Productivity Kit Key Learning Points

Question	Answer
1. If available, Jump-in Points are available in what modes?	<i>Try it and See it</i>
2. Which of the following is <b>not</b> a mode used in the Browser-Based Player? <ul style="list-style-type: none"> <li>a. See It</li> <li>b. Use It</li> <li>c. Try It</li> <li>d. Know It</li> <li>e. Do It</li> </ul>	b. Use it
3. What do Action boxes allow you to do?	Quickly click through a tutorial or lesson

## Lesson 4 – Accessing Additional Information

Topics
Business Process Documents
Job Aids
Other Attachments

### Introduction

While See It!, Try It!, and Do It! modes allow you to work through the steps of a task, additional information may also be incorporated within the UPK content in various places. Information may be associated with an outline item (i.e., a module, lesson, or topic), or a particular screen. It may contain conceptual information presented in plain text format or a diagram or chart. In addition, you may be able to launch external documents or web sites.

### Transition

We will explore and view some of the most common documents you will use during training.

### Explanation

#### **Business Process Documents**

Business process documentation provides a step-by-step record of the procedures and actions that underpin your business processes. This information is useful when you are using the tutorial in *Try it!* Mode. The document is derived from the content developed in the Try It Mode, and may be found as a link in the topic concept pane.

### Show up as PDF's

#### **Job Aids**

These aids provide a quick reference guide that enables users to view the procedures free of conceptual information (screen shots). May also be found as a link in the topic concept pane.

## Reference information

### **Hyperlinks**

These documents usually are links to websites. They will include compliance or regulation information located externally.

### **External Documents**

These documents provide additional reference information on a particular topic? It may have been included in previous versions of the application. They include flow charts, bitmaps, etc. Links to these documents are normally found in the concept panes at the Module, Lesson or Topic levels.

## **Module Closeout**

### **Introduction**

We have now completed the review of Using the PeopleSoft User Productivity Kit (UPK)