Roadmap to UPK 3.1 Session #1
UPK 3.1 Practice Exercises

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Roadmap to UPK 3.1 Session 1

Record a New Topic

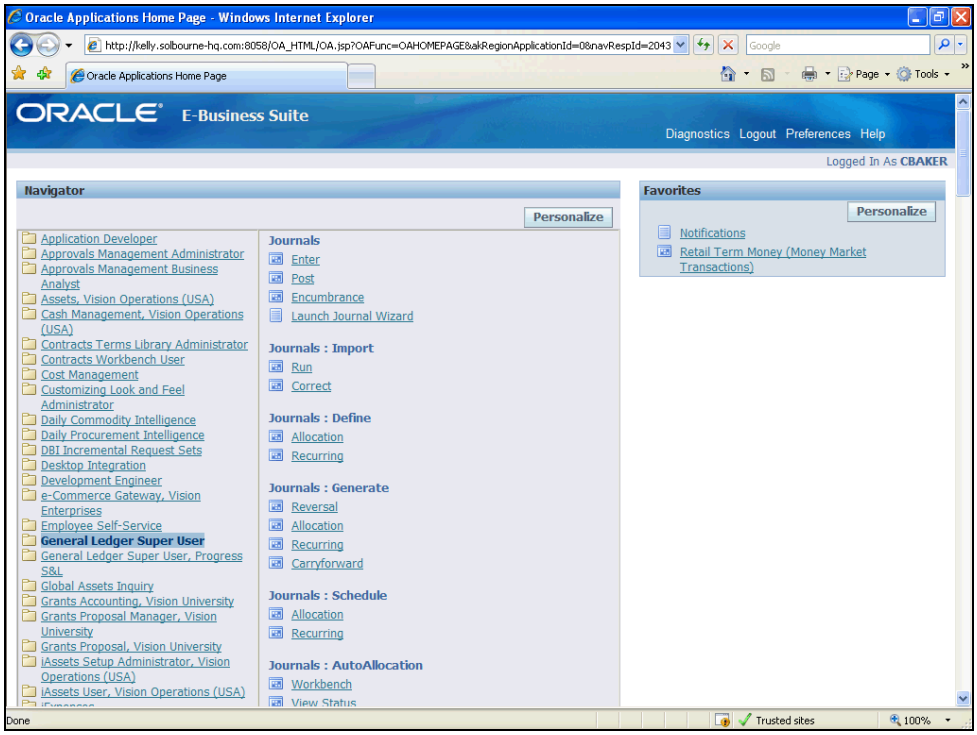
Procedure

Objective:
By the end of this exercise, you will be able to do the following:
- **Record a new topic.**
- **Save the changes and return to the Outline Editor.**

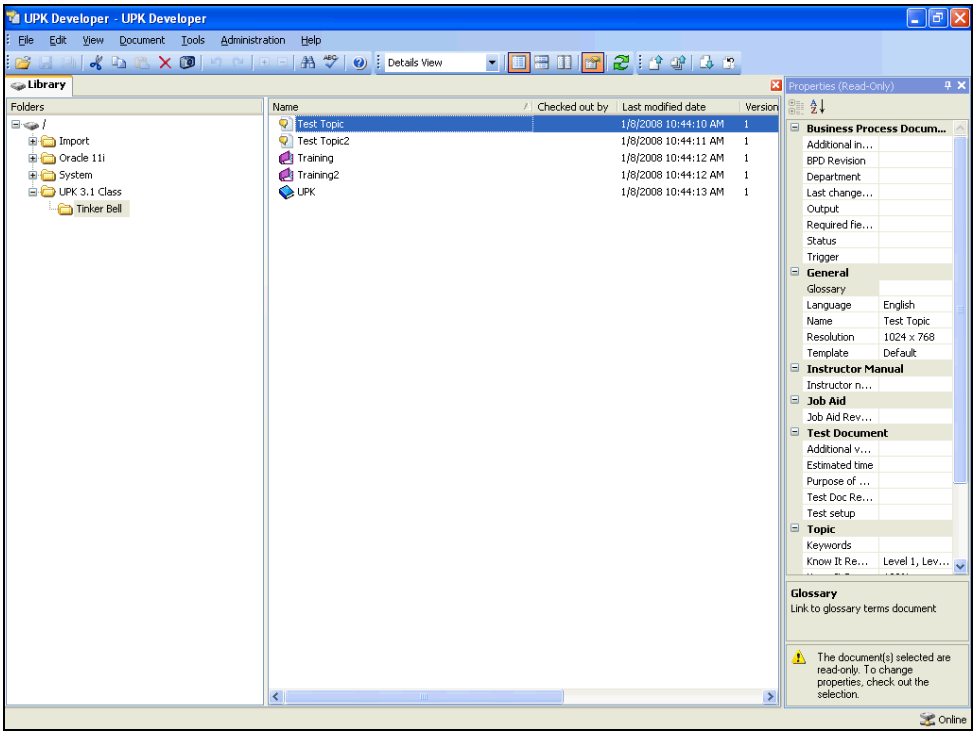
About the Sample Data:
This procedure records a new GL topic for entering budget amounts.

Prerequisites:
- **UPK 3.1 was installed successfully.**
- **Recording defaults have been set.**
- **The training folder, module, and section were previously created.**
- **Access to the Oracle GL Super User responsibility must be available.**

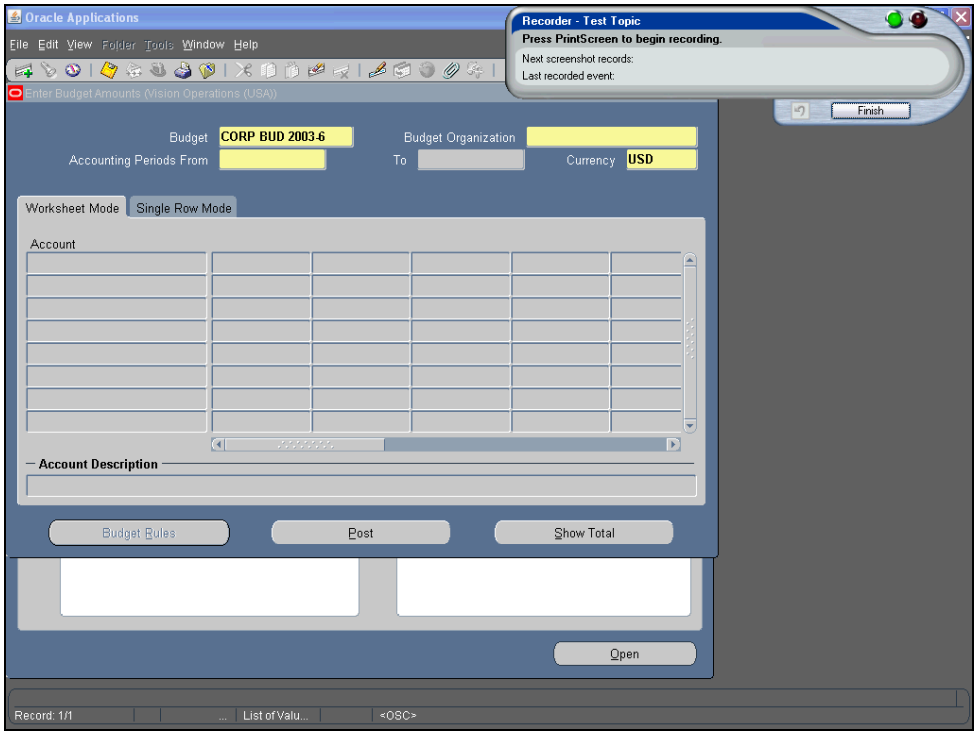
Step	Action
1.	**To complete this procedure, follow the menu path:** **START > PROGRAMS > USER PRODUCTIVITY KIT CLIENT > UPK DEVELOPER CLIENT > LIBRARY > YOUR UPK CLASS FOLDER.**



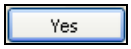
Step	Action
2.	**Before you begin, choose a task in Oracle to record.** **In this example, the GL task to enter a budget has been used.**



Step	Action
3.	**In your UPK class folder, double-click TEST TOPIC to begin recording.**
4.	**Because the document was not checked out, UPK asks you whether to check it out now.** **Click the Yes button.** Yes



Step	Action
5.	**Because Test Topic had no previously recorded frames, the recorder automatically opens, waiting for your next action in Oracle.** **Verify you are at the first step of the procedure.** **Click in the Oracle Applications window to ensure it is active.**
6.	**Press [PrintScreen] on the keyboard.**
7.	**Perform the next action in Oracle and press [PrintScreen] to capture the next screenshot and action.** **Repeat the Oracle action and [PrintScreen] sequence for the remaining steps in the procedure.**
8.	**When all Oracle steps have been captured, return to UPK Developer.** **Click the Finish button.** Finish
9.	**The Recorder returns to the Topic Editor.** **Make any necessary changes to the newly-recorded frames, then exit the Topic Editor.** **Click the Exit button.**

Step	Action
10.	**Click the Yes button.** 
11.	**In this exercise, you learned how to record a new topic.** **End of Procedure.**

Creating Documents and Building an Outline

Procedure

Objective:

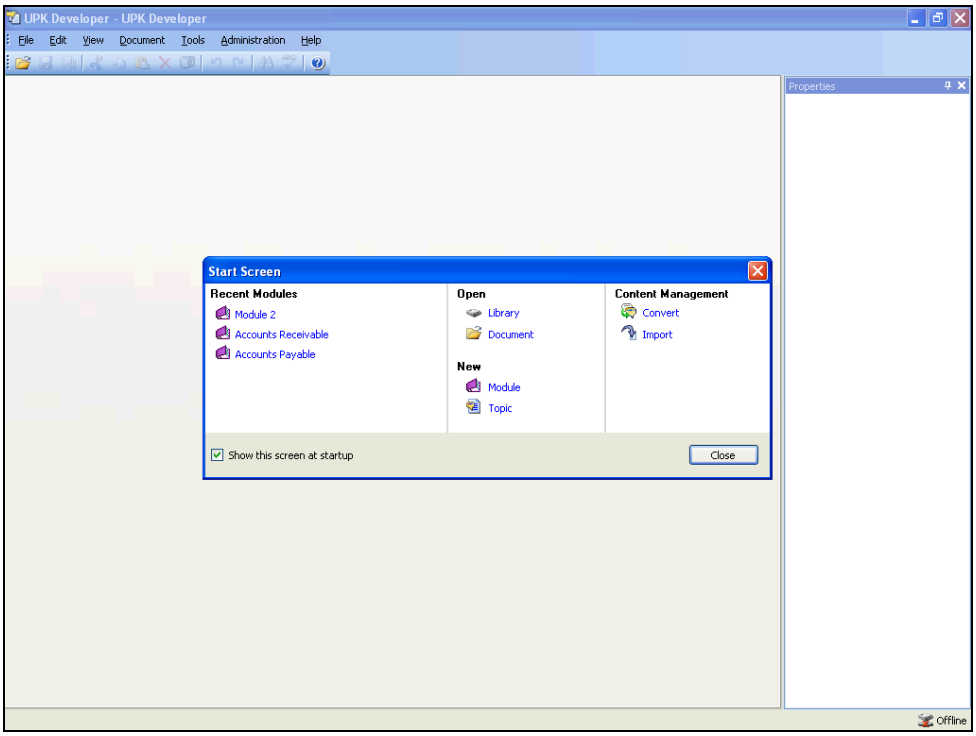
By the end of this exercise, you will be able to do the following:

- **Open a document from the Library.**
- **Create a module.**
- **Link a section.**
- **Link a topic.**
- **Move sections and topics to/from different modules.**

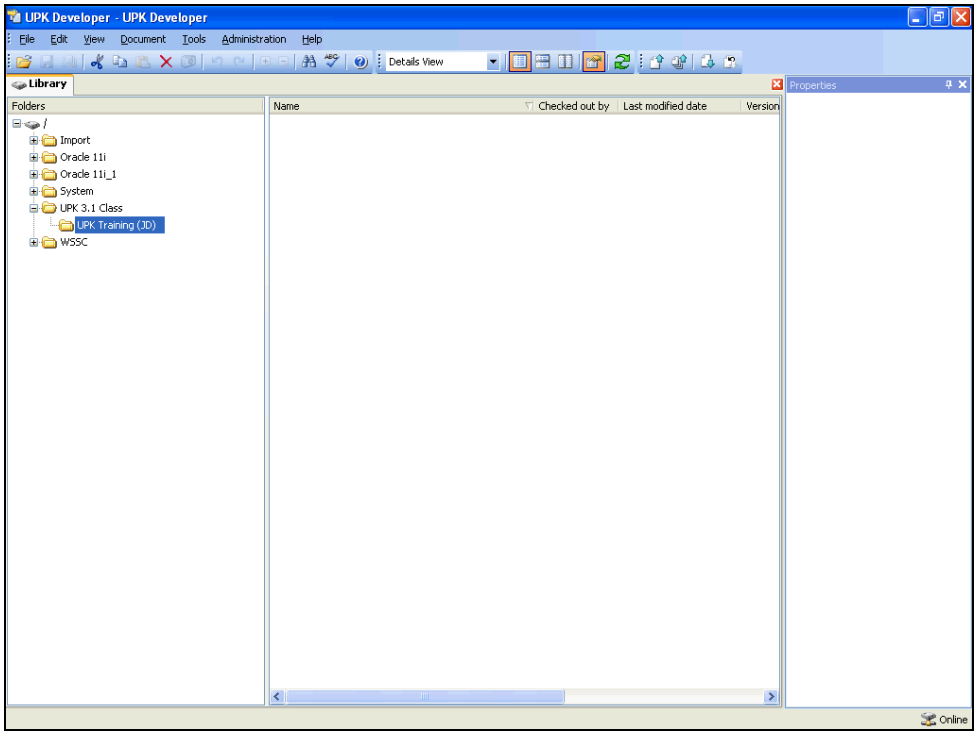
Prerequisites:

- **UPK 3.1 was installed successfully.**
- **Personal UPK training folder was created successfully in module 1.**

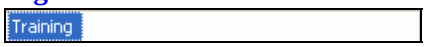
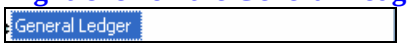
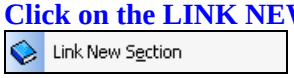
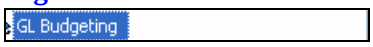
Step	Action
1.	**To complete this procedure, go to the menu path:** **START > PROGRAMS > USER PRODUCTIVITY KIT CLIENT > UPK DEVELOPER CLIENT.**

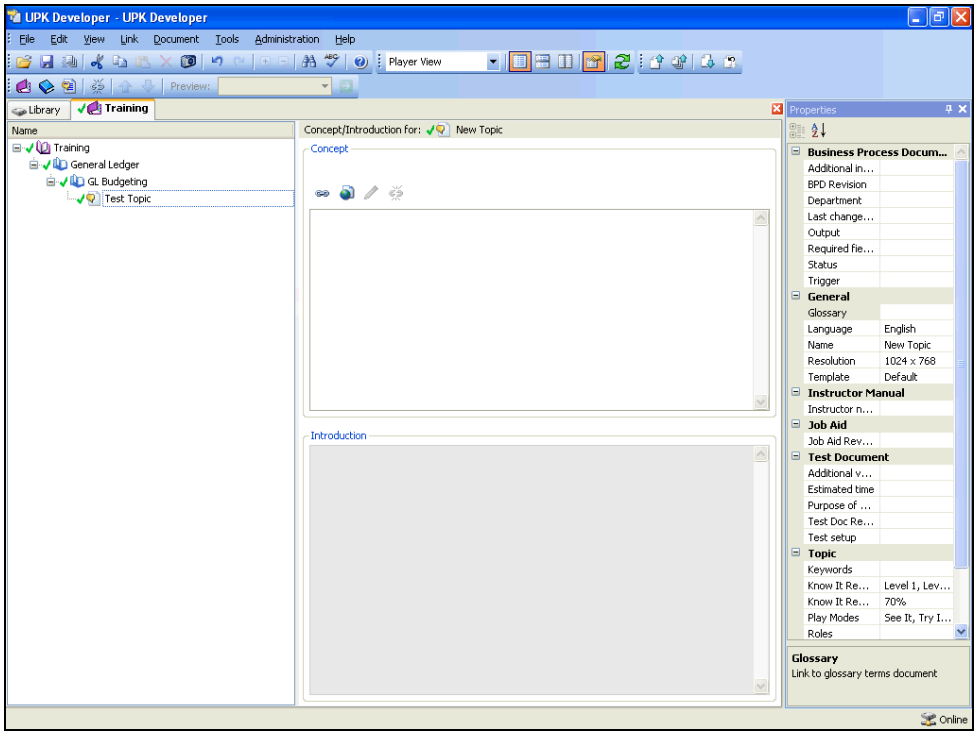


Step	Action
2.	**Open the UPK Developer Library.** **Click the LIBRARY link.** Library

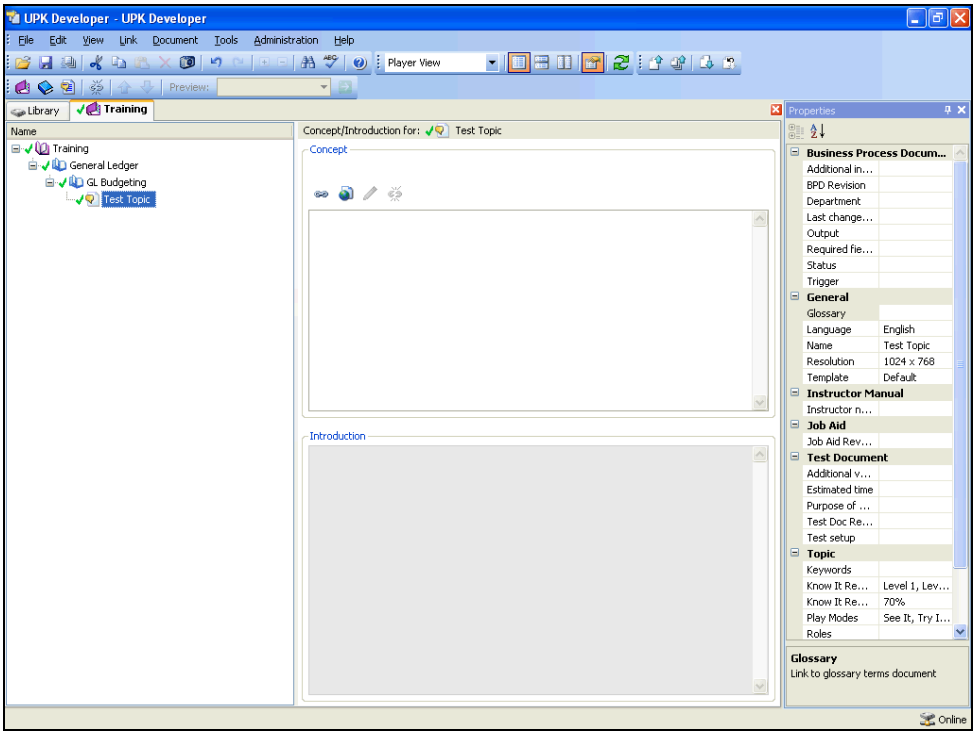


Step	Action
3.	**Documents can be created in the library or they can be created while in the outline editor.** **First, from the library, select your UPK 3.1 Class training folder you created in Module 1. Create a new module.** **Click on the FILE menu.** File
4.	**Click on the MODULE menu item.**
5.	**Type Training in the NAME field.**
6.	**Click the OK button.** OK

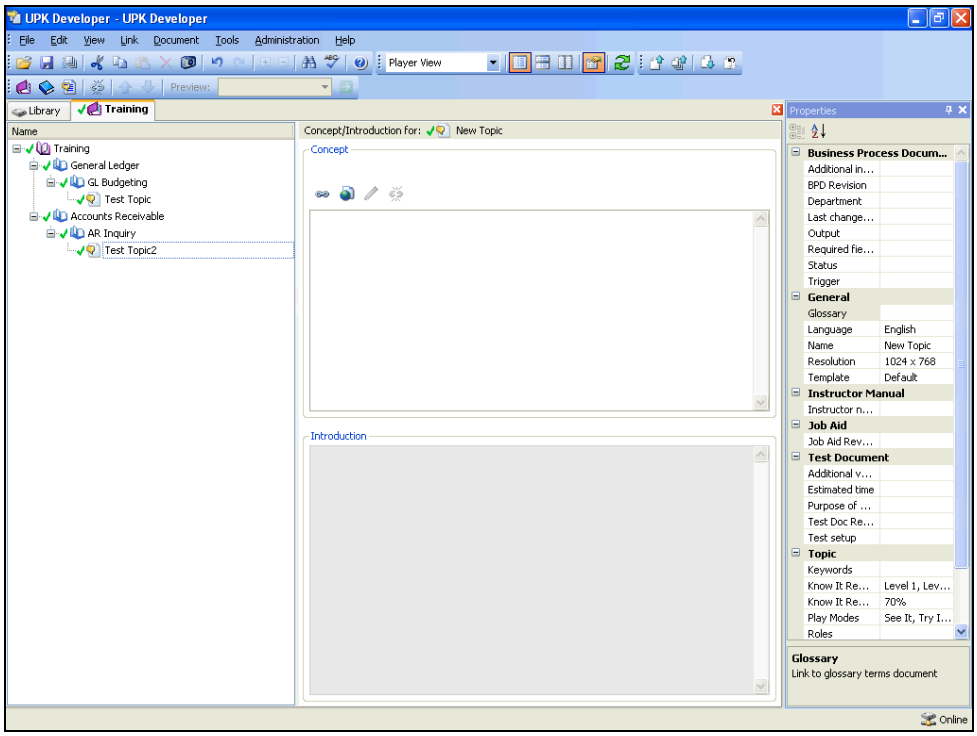
Step	Action
7.	**The *Training* module opens in a new tab and is automatically checked out to you as it is a new document.** **Link a new section under the Training module.** **Right-click on the TRAINING module.** 
8.	**Click the LINK NEW SECTION menu item.**
9.	**Name the new section.** **Type General Ledger in the NEW SECTION field.**
10.	**Press [Enter] to accept the text.**
11.	**Link a new section under the General Ledger section.** **Right-click on the General Ledger section.** 
12.	**Click on the LINK NEW SECTION menu item.** 
13.	**Type GL Budgeting into the NEW SECTION field.**
14.	**Press [Enter] to accept the text.**
15.	**Link a new topic.** **Right-click on the GL BUDGETING section.** 
16.	**Click the LINK NEW TOPIC menu item.**
17.	**Name the new topic.** **Type Test Topic in the NEW TOPIC field.**



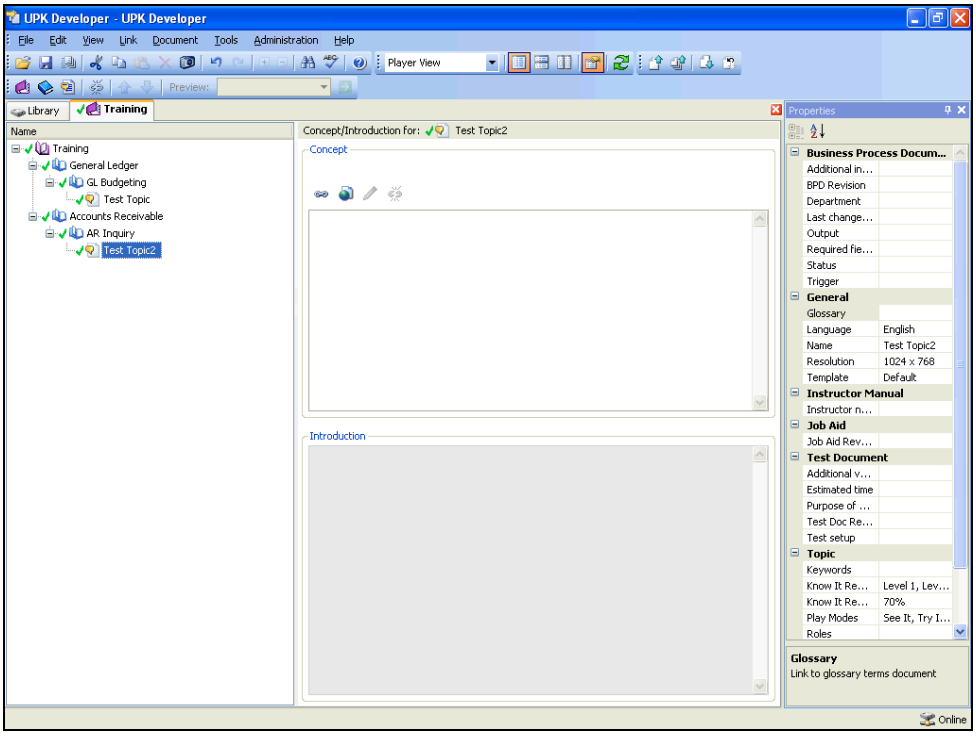
Step	Action
18.	**The new topic will automatically be stored in the library folder in which the module is located in.** **Press [Enter] to accept the text.**

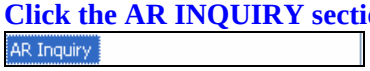


Step	Action
19.	**Link an additional section and topic using the icons on the toolbar.** **Click on the TRAINING module.**
20.	**Click on the LINK NEW SECTION icon.**
21.	**Enter Accounts Receivable in the NEW SECTION field.**
22.	**Press [Enter] to accept the text.**
23.	**Create a new section under the Accounts Receivable section.** **Click the LINK NEW SECTION icon.**
24.	**Type AR Inquiry into the NEW SECTION field.**
25.	**Press [Enter] to accept the text.**
26.	**Link a new topic under the AR Inquiry section.** **Click on the LINK NEW TOPIC icon.**
27.	**Rename the new topic.** **Type Test Topic2 in the NEW TOPIC field.**



Step	Action
28.	**Press [Enter] to accept the text.**



Step	Action
29.	**Move a topic to an alternative section using the cut and paste method.** **Verify Test Topic2 is selected in the list.** **Click on the CUT icon.**
30.	**Click on the GL Budgeting section to select.**
31.	**Click on the PASTE icon.**
32.	**Test Topic2 is now located under the GL Budgeting section.**
33.	**Move a section to an alternative module using the drag and drop method.** **Click the AR INQUIRY section in the list.** 
34.	**The AR Inquiry section is now located under the GL Budgeting module.** **Close the tab for the *Training* module.** **Right-click the *Training* tab**.

Step	Action
35.	**Click the CLOSE menu item.**
36.	**You are returned to the *Library*.**
37.	**In this exercise, you learned how to create and work with document in the Outline Editor.** **End of Procedure.**

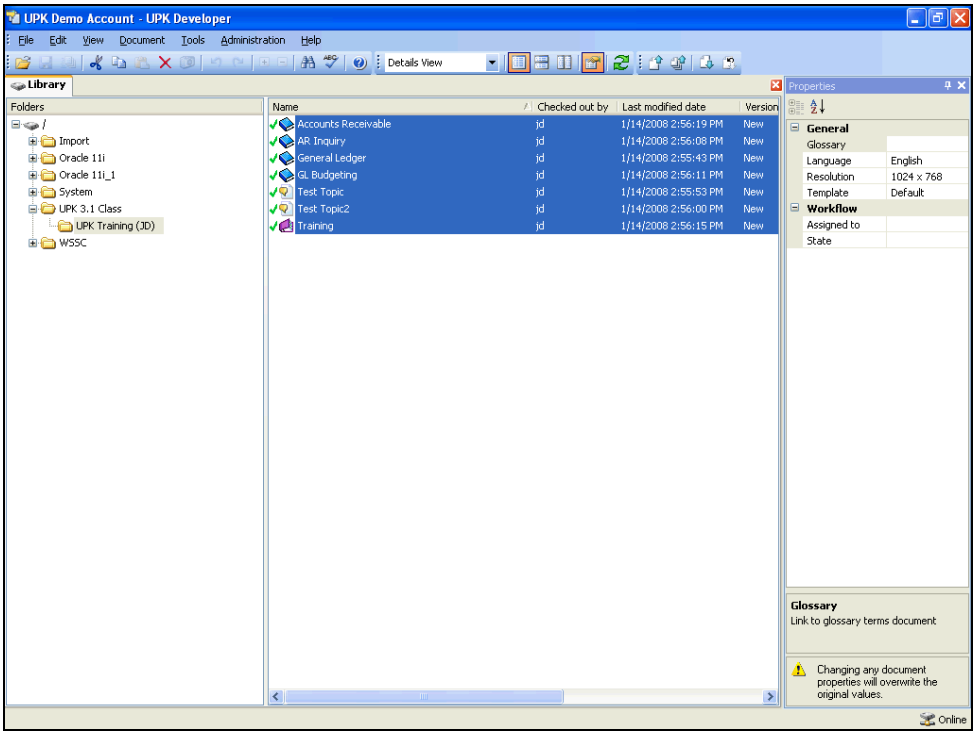
Deleting Content from the Library

Procedure

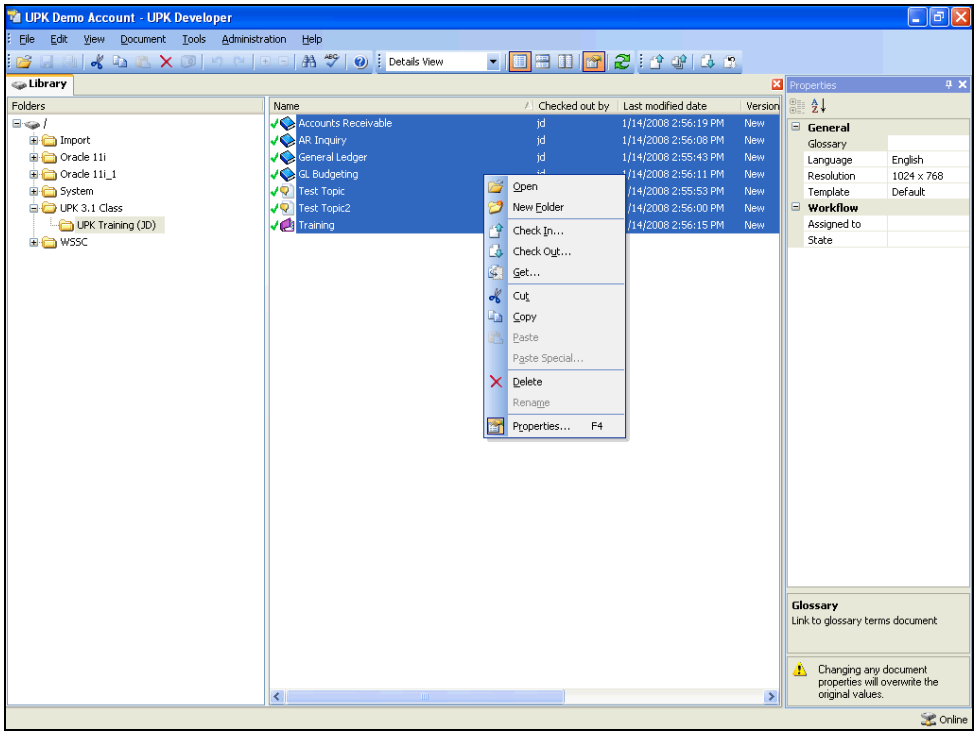
Objective:
By the end of this exercise, you will be able to do the following:
- **Delete content from the library**

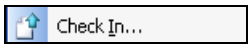
Prerequisites:
- **UPK 3.1 was installed successfully.**

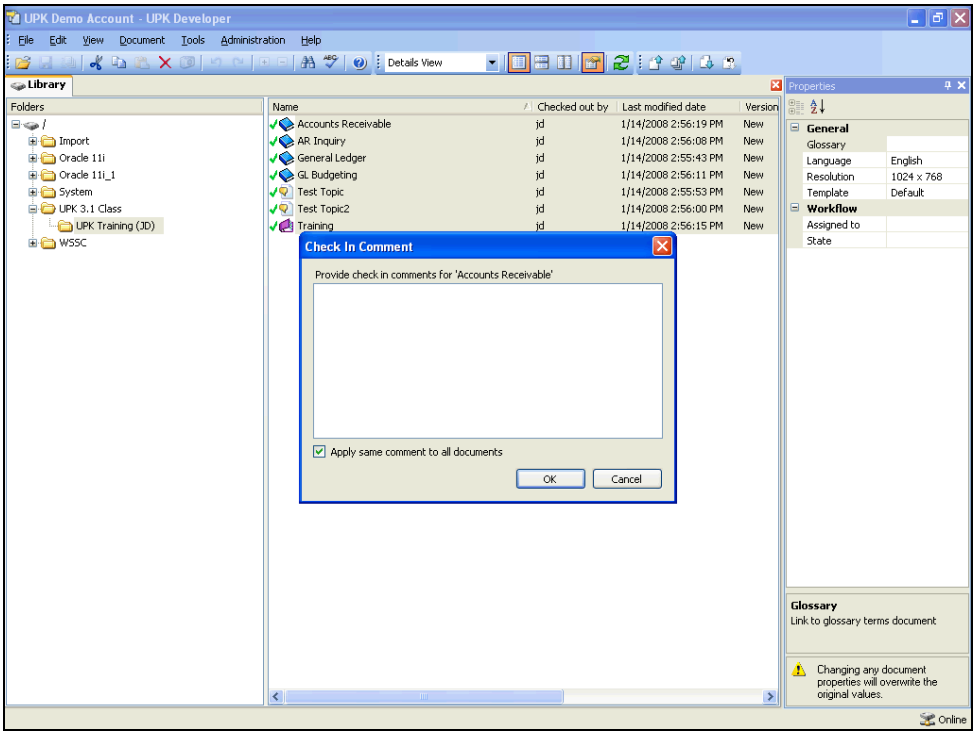
Step	Action
1.	**To complete this procedure, go to the menu path:** **START > PROGRAMS > USER PRODUCTIVITY KIT CLIENT > UPK DEVELOPER CLIENT > LIBRARY TAB.**
2.	**Delete a section in your UPK Training folder using a toolbar icon.** **First, the content must be checked in.** **Press [Ctrl+A] on the keyboard.**
3.	**Delete a section in your UPK Training folder using a toolbar icon.** **First, the content must be checked in.** **Press [Ctrl+A] on the keyboard.**

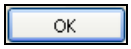


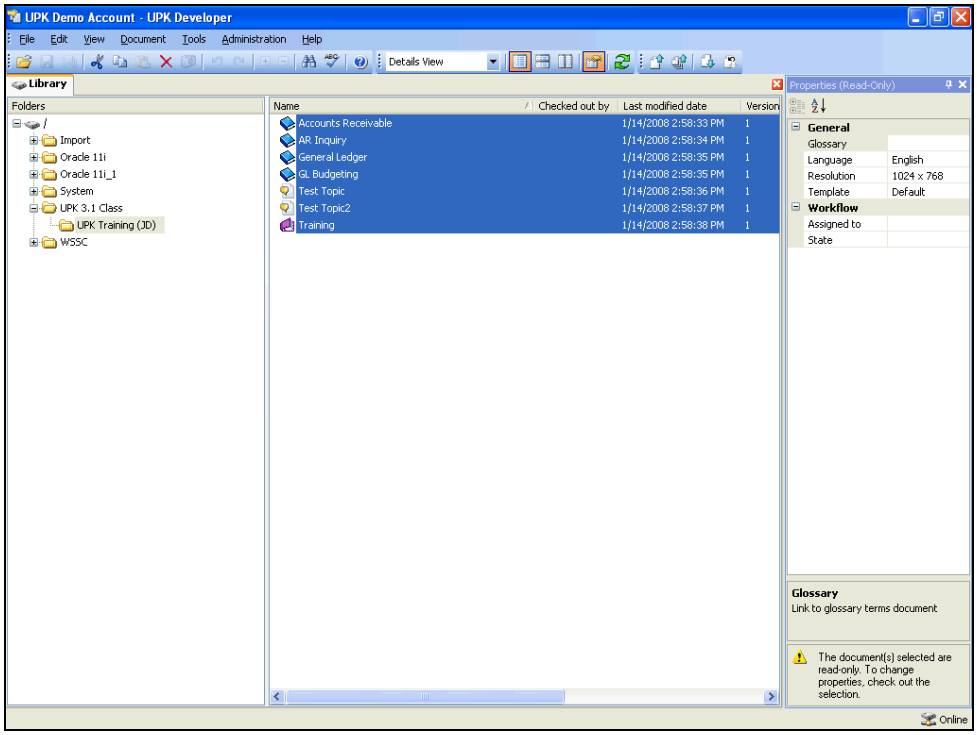
Step	Action
4.	**Right-click on the selection.**

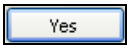


Step	Action
5.	**Click the CHECK IN menu item.** 



Step	Action
6.	**Type First Draft into the CHECK COMMENT field.**
7.	**Click on OK.** 
8.	**All content has been checked in.**



Step	Action
9.	**Delete a section using a toolbar icon.** **Click the AR INQUIRY section in the list.**
10.	**Click on the DELETE icon.**
11.	**Confirm the deletion.** **Click on YES.** 
12.	**In this exercise, you learned how to manage library content.** **End of Procedure.**

Publishing for Deployment

Procedure

Objective:

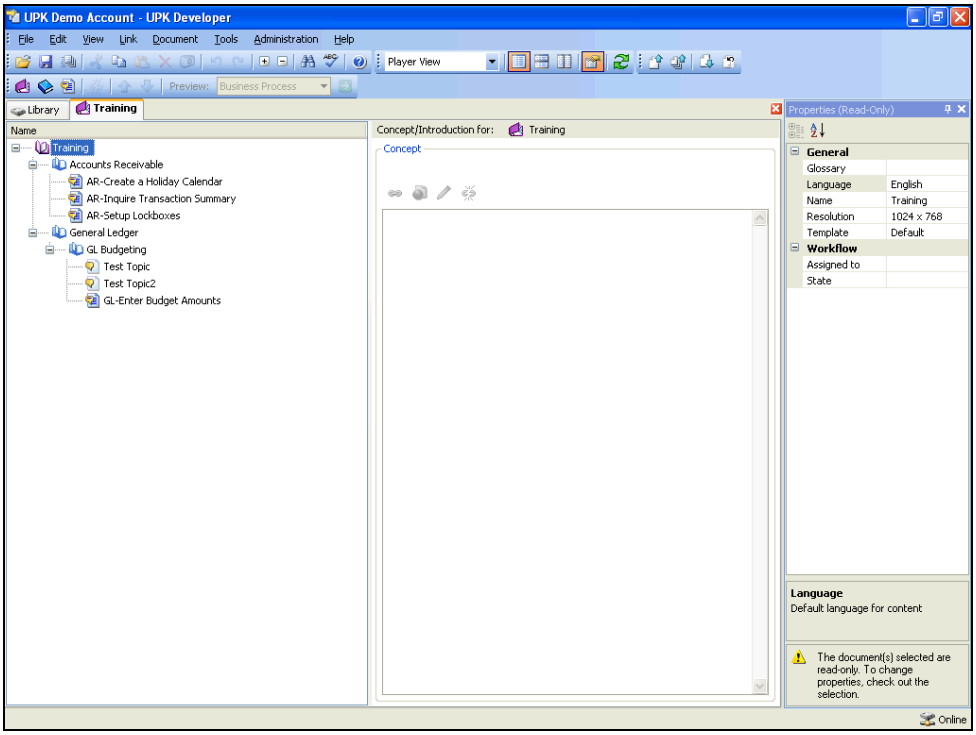
By the end of this exercise, you will be able to publish content the following deployment options:

- **A Player Package used for online help integration with Oracle.**
- **A standalone HTML Web Site.**
- **A SCORM package used for integration with a Learning Management System (LMS).**
- **Standalone Topic Files used to share with other UPK Developer 3.1 installations.**

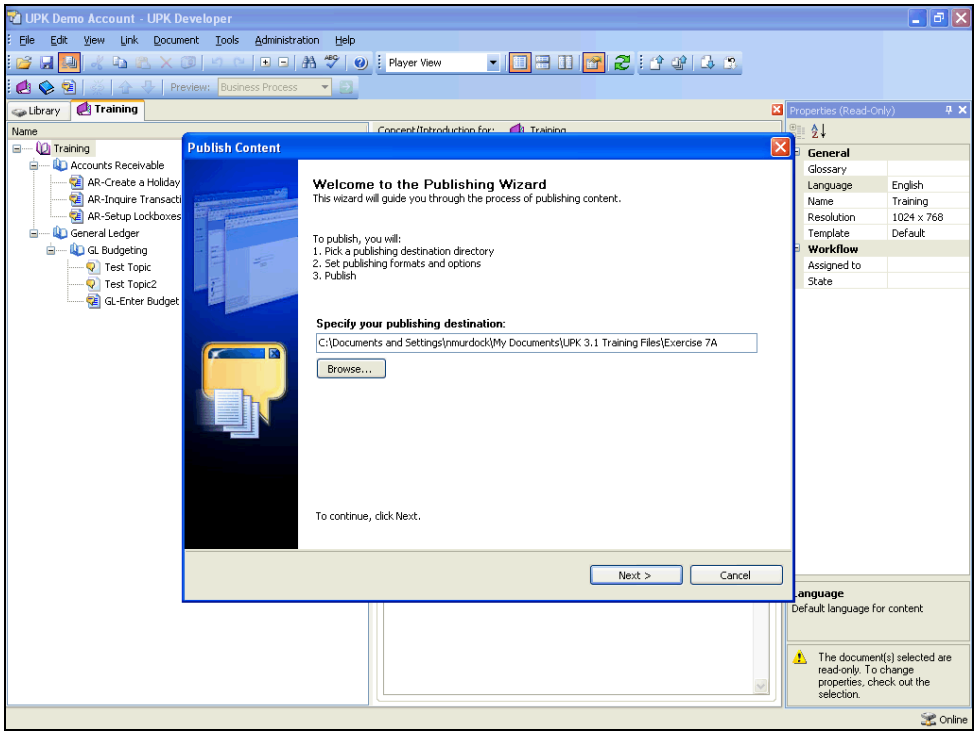
Prerequisites:

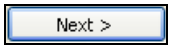
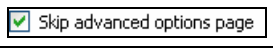
- **Existing content is available to deploy.**

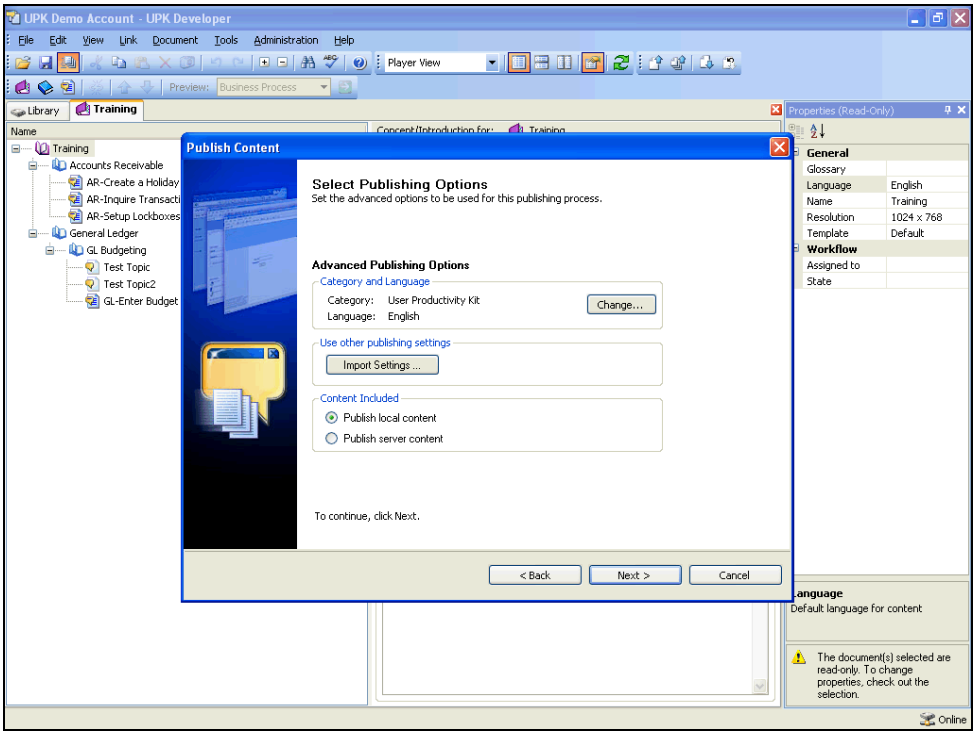
Step	Action
1.	**Navigate to your UPK Training folder.**
2.	**Open the Training module.** **Double-Click on TRAINING.**
3.	**Expand all levels of the Training module.**



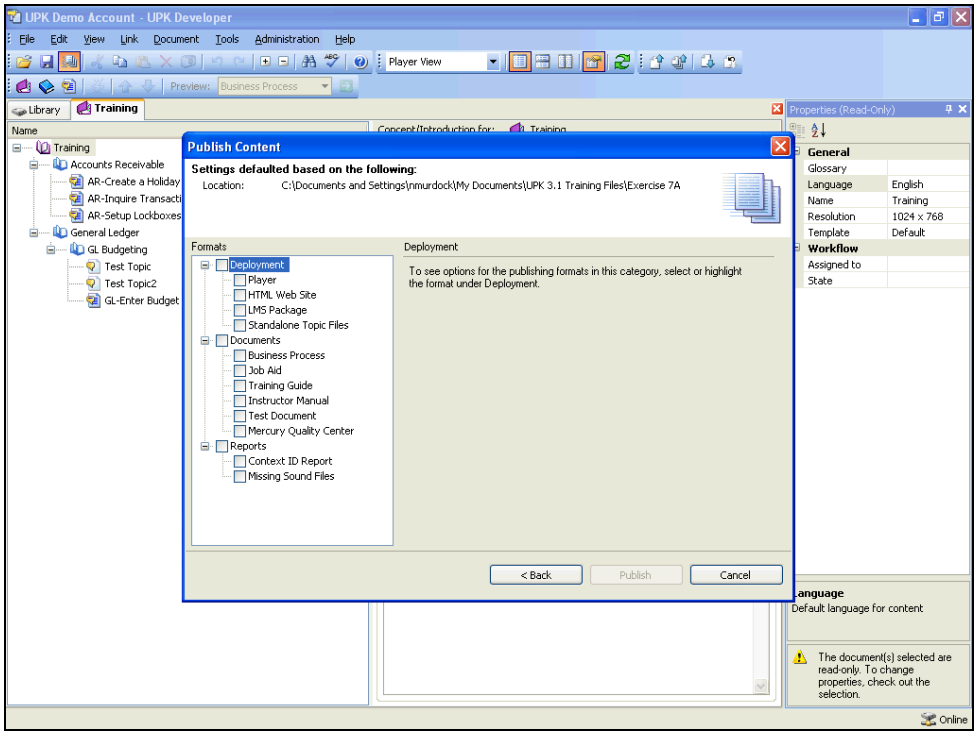
Step	Action
4.	**Publish the Training module.** **Click on the PUBLISH icon.**



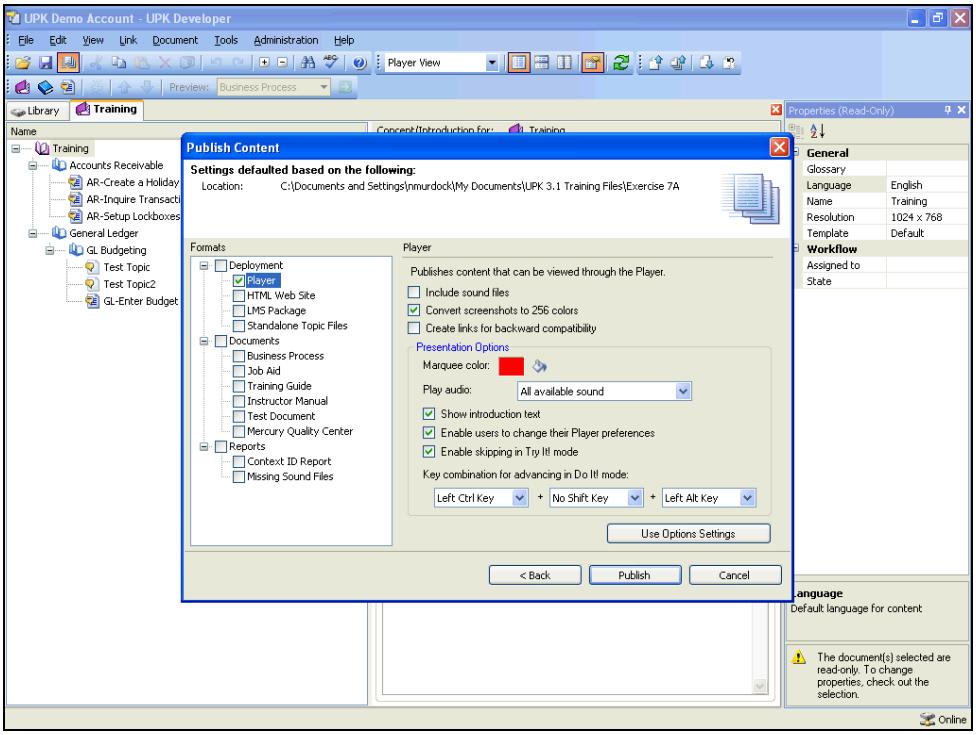
Step	Action
5.	**Accept the default destination directory or change it to another location.** **Click on NEXT.** 
6.	**Choose whether to publish the selection or the entire outline shown in the Outline Editor.** **De-select the default checkbox for skipping advanced options.** 
7.	**Click on NEXT.**



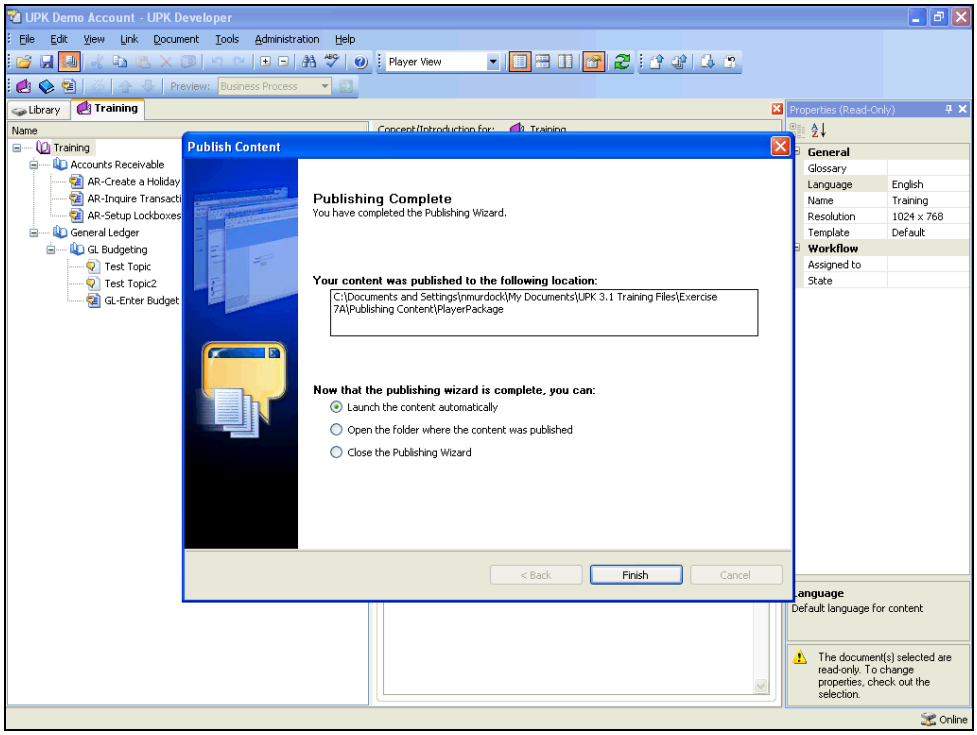
Step	Action
8.	**Optional. Review and modify the selections for advanced publishing options for logos and formatting (category), language, import settings from an external location, and checked in/out document versions (local vs. server).** **Click on NEXT.** Next >



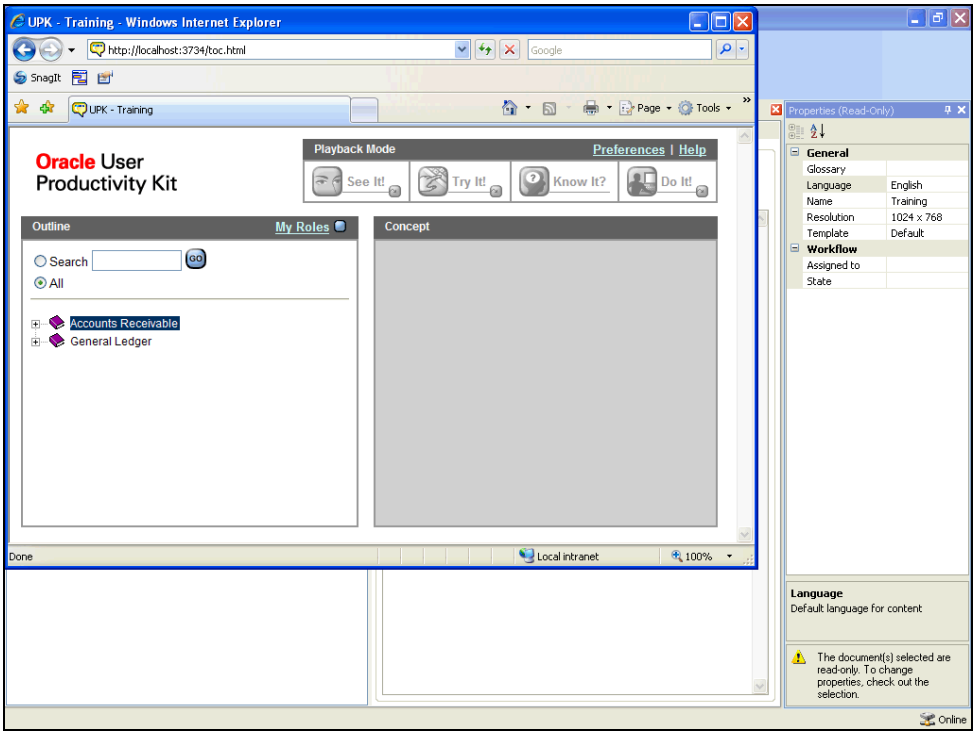
Step	Action
9.	**Click the PLAYER checkbox.**



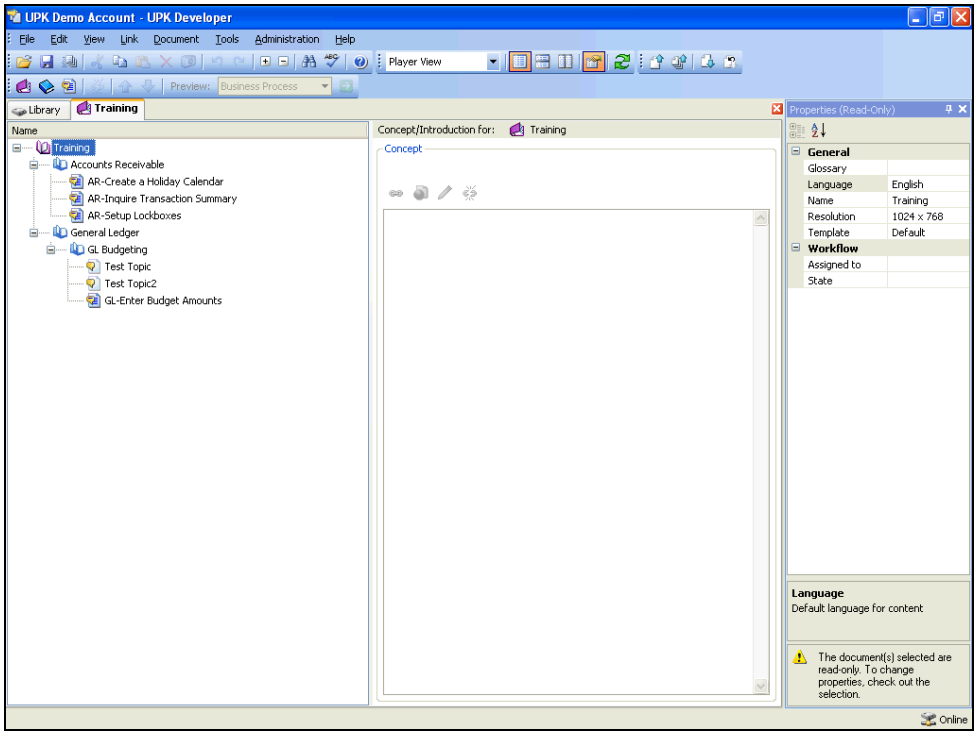
Step	Action
10.	**Optional. Change the default settings.** **Click on PUBLISH.** Publish
11.	**UPK displays the publishing progress for the Player package.**

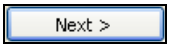
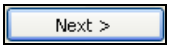
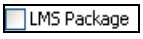


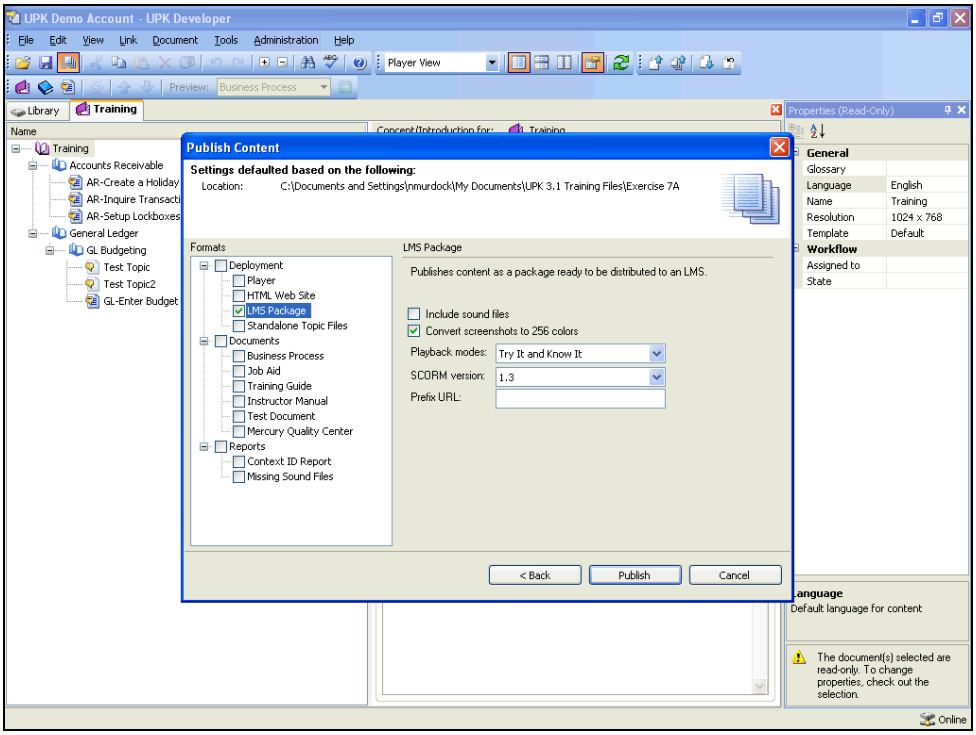
Step	Action
12.	**View the content in the Player format automatically.** **Click on FINISH.** Finish



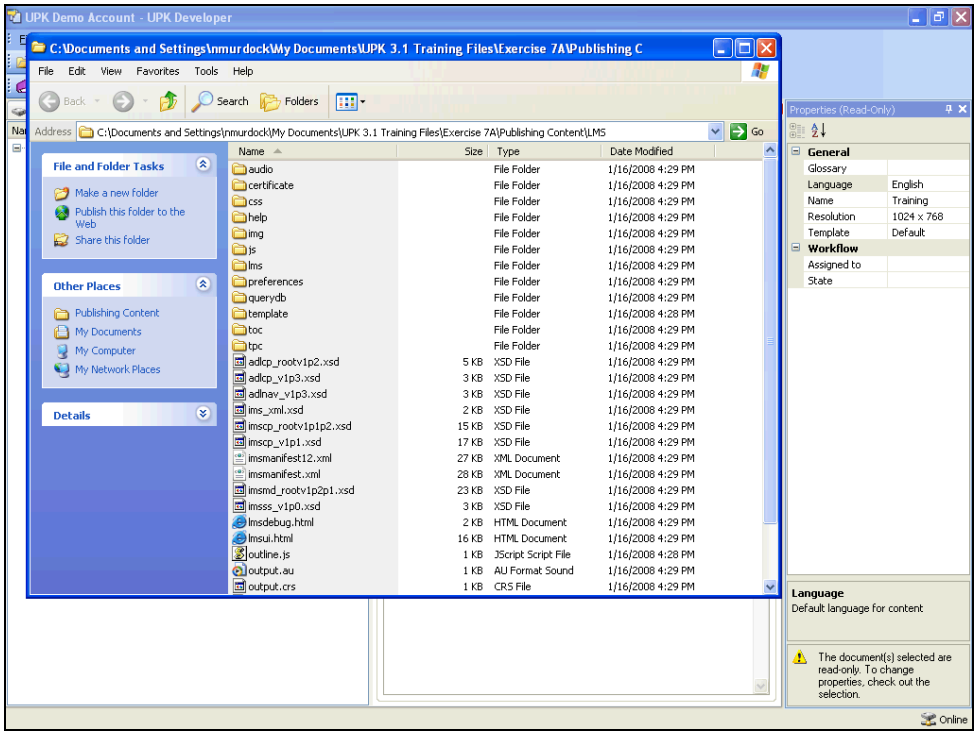
Step	Action
13.	**The Player Package displays in its own Browser window.** **Expand the outline.** **Click the [+] icons.**
14.	**Close the Player window.**



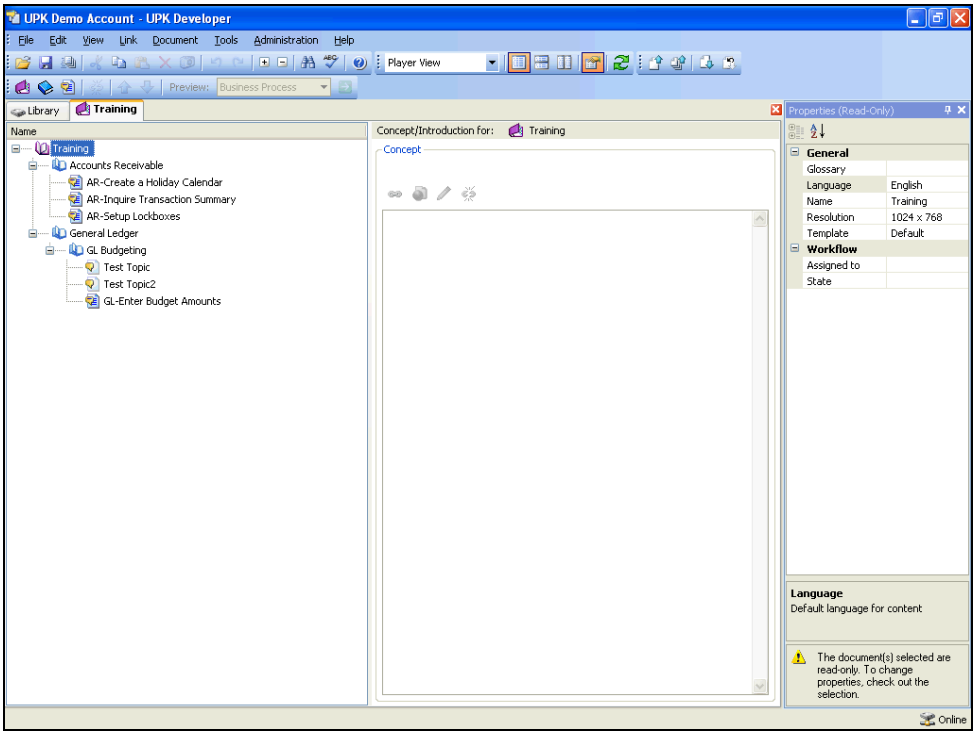
Step	Action
15.	**Publish content for a SCORM packaged used for a Learning Management System (LMS).** **Click on PUBLISH.**
16.	**Select the publishing destination or accept the default.** **Click on NEXT.** 
17.	**Click on NEXT.** 
18.	**De-select the Player option.** **Click on the PLAYER checkbox.**
19.	**Click on the LMS PACKAGE checkbox.** 

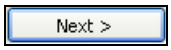
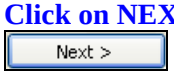


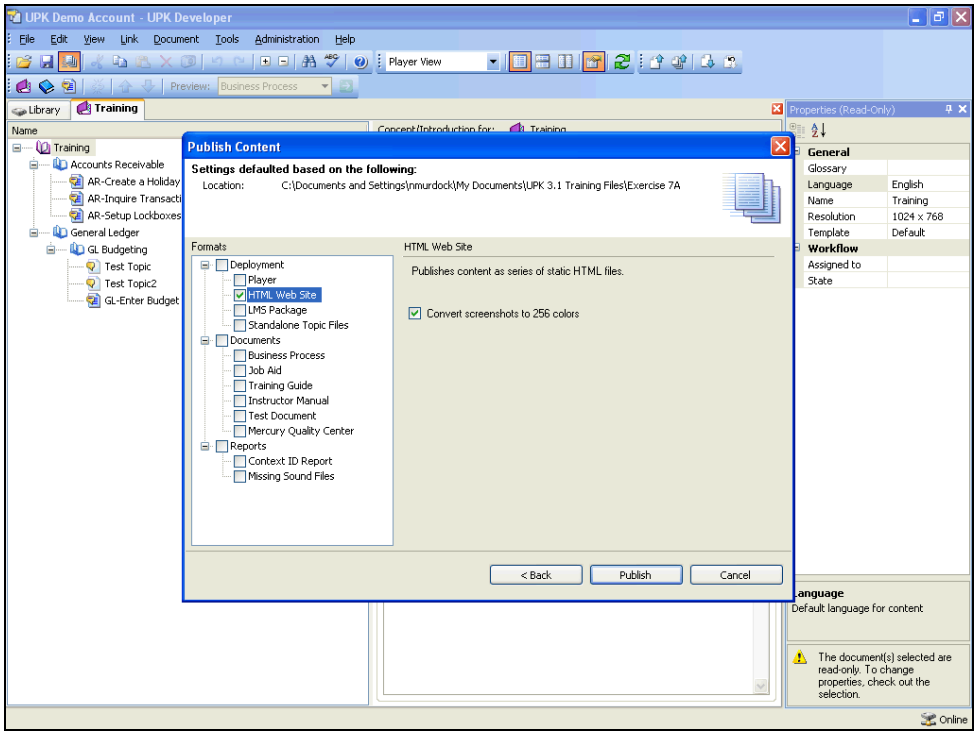
Step	Action
20.	**Optional. Change the publishing defaults.** **Click on PUBLISH.** Publish
21.	**UPK displays the publishing progress for the LMS package.**
22.	**Open the folder where the content was published.** **Click on FINISH.** Publish



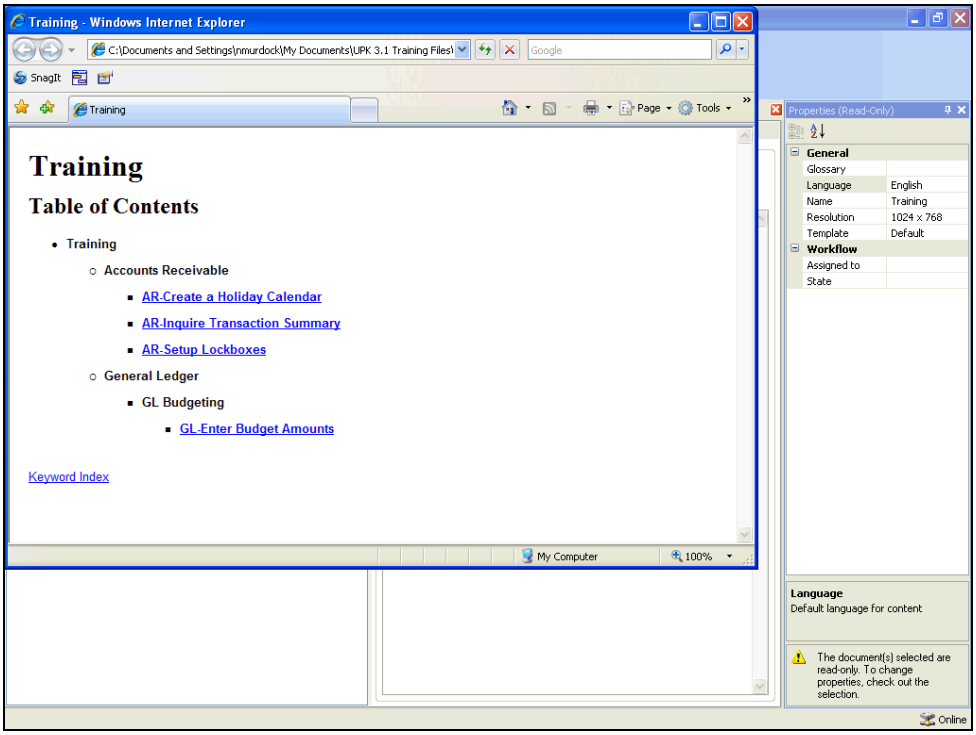
Step	Action
23.	**View the file structure for the LMS SCORM package.** **Close the window.**



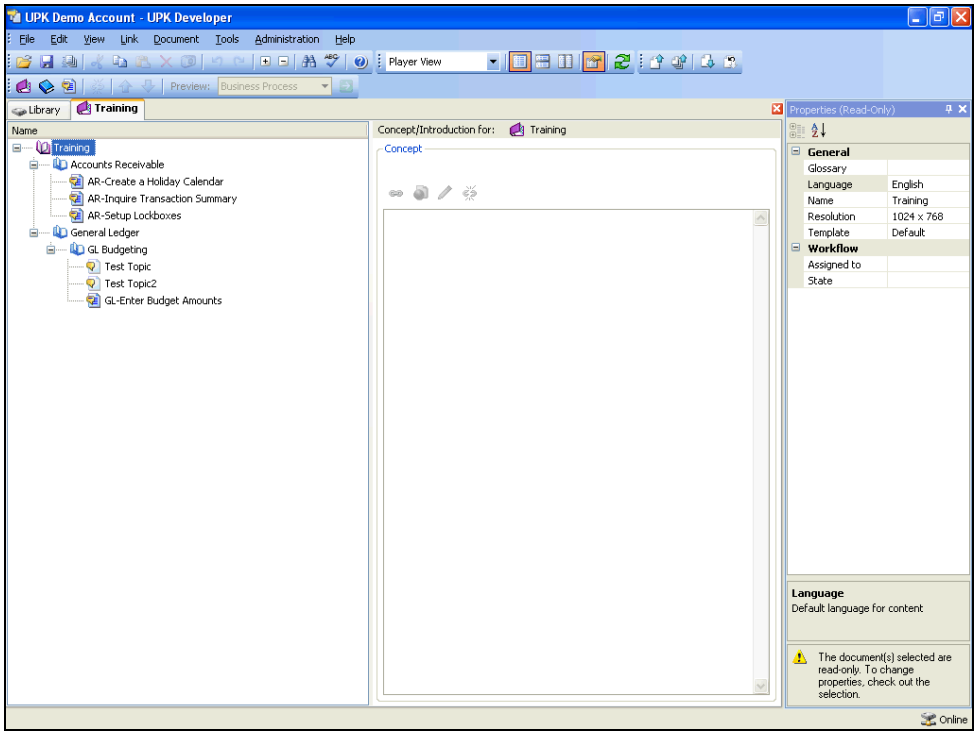
Step	Action
24.	**Publish content to a standalone HTML web site.** **Click on PUBLISH.**
25.	**Click on NEXT.** 
26.	**Click on NEXT.** 
27.	**De-select the LMS Package option.** **Click on LMS PACKAGE.**
28.	**Click on the HTML WEB SITE checkbox.**

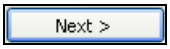
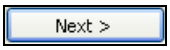
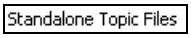


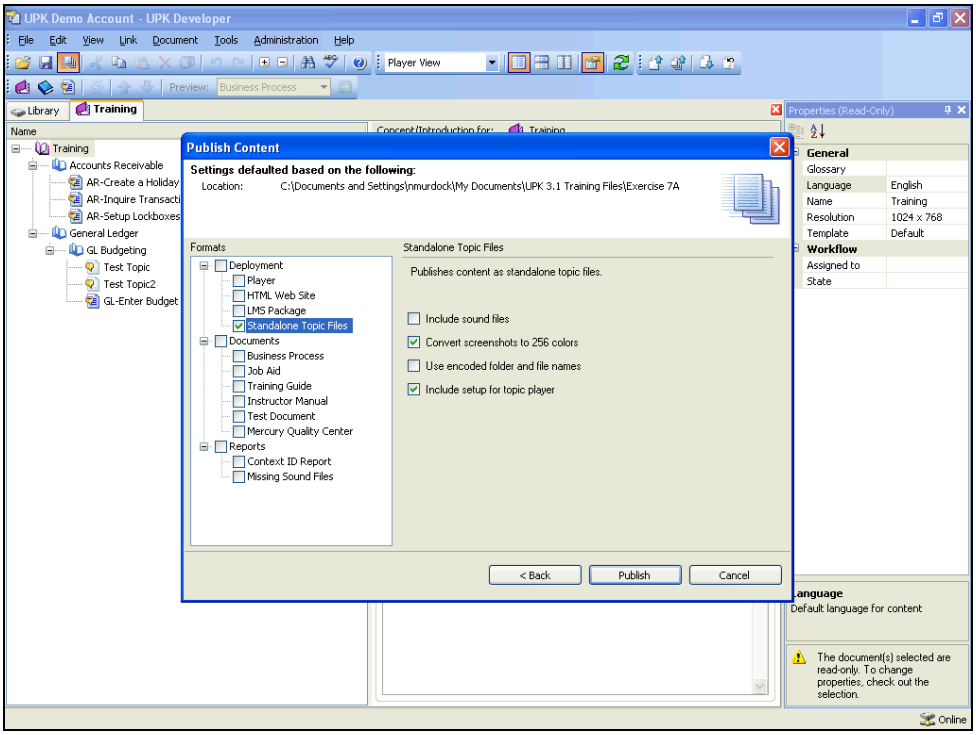
Step	Action
29.	**Click on PUBLISH.** Publish
30.	**UPK displays the publishing progress for the standalone HTML Web Site.**
31.	**Open the HTML Web Site.** **Click on FINISH.** Finish



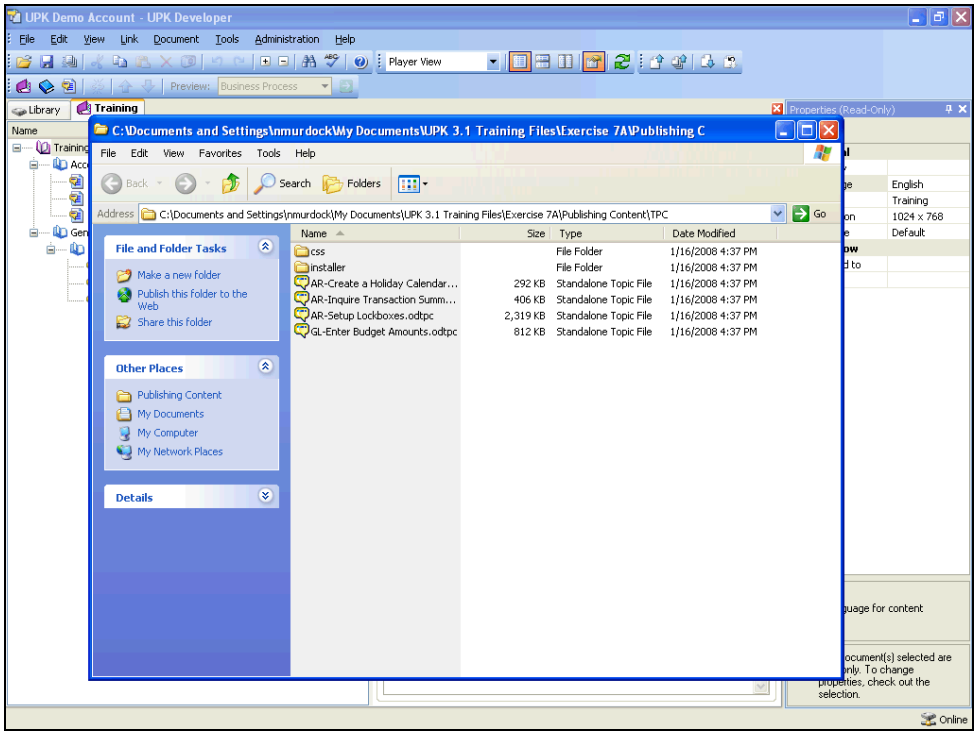
Step	Action
32.	**View the output by clicking on the links.** **Close the window.**



Step	Action
33.	**Publish the content to stand alone topic files.** **Click the PUBLISH icon.**
34.	**Click on NEXT.** 
35.	**Click on NEXT.** 
36.	**De-select the HTML Web Site option.** **Click in the HTML WEB SITE checkbox.**
37.	**Click in the STANDALONE TOPIC FILES checkbox.** 



Step	Action
38.	**Click on PUBLISH.** Publish
39.	**UPK displays the publishing progress for the standalone topic files.**
40.	**Open the folder where the content was published.** **Click on FINISH.** Finish



Step	Action
41.	**Close the window.**
42.	**In this exercise, you learned how to publish content for four (4) different deployment options: Player Package, SCORM package for LMS integration, HTML Web Site, and Standalone Topic Files.** **End of Procedure.**

Publish for Print

Procedure

Objective:

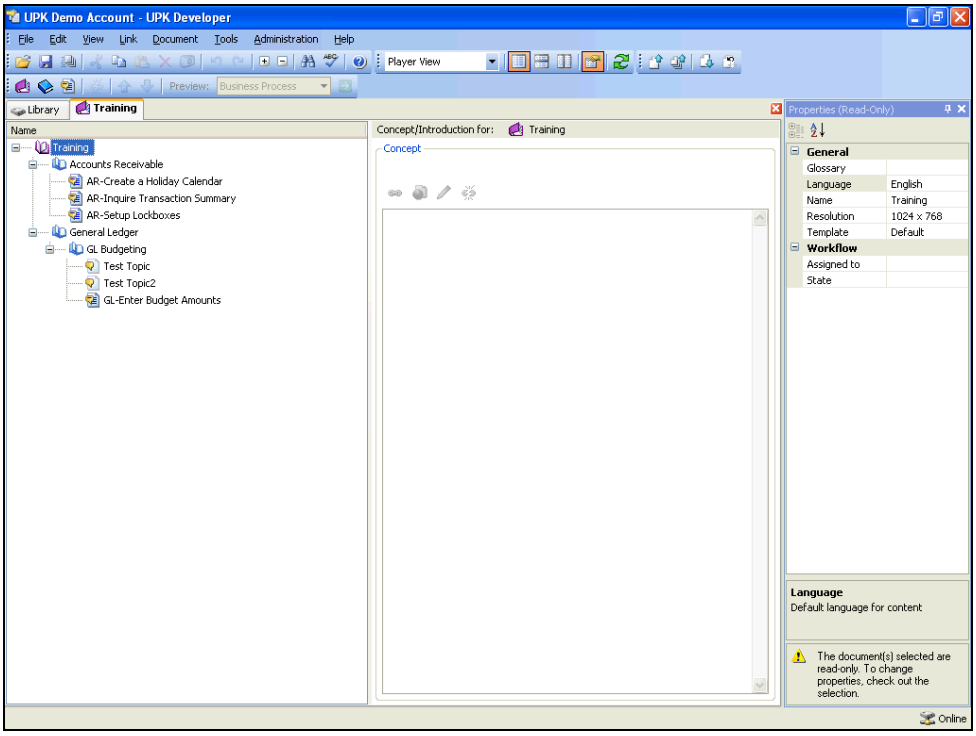
By the end of this exercise, you will be able to publish content the following document formats:

- **A Business Process Document.**
- **A Job Aid.**

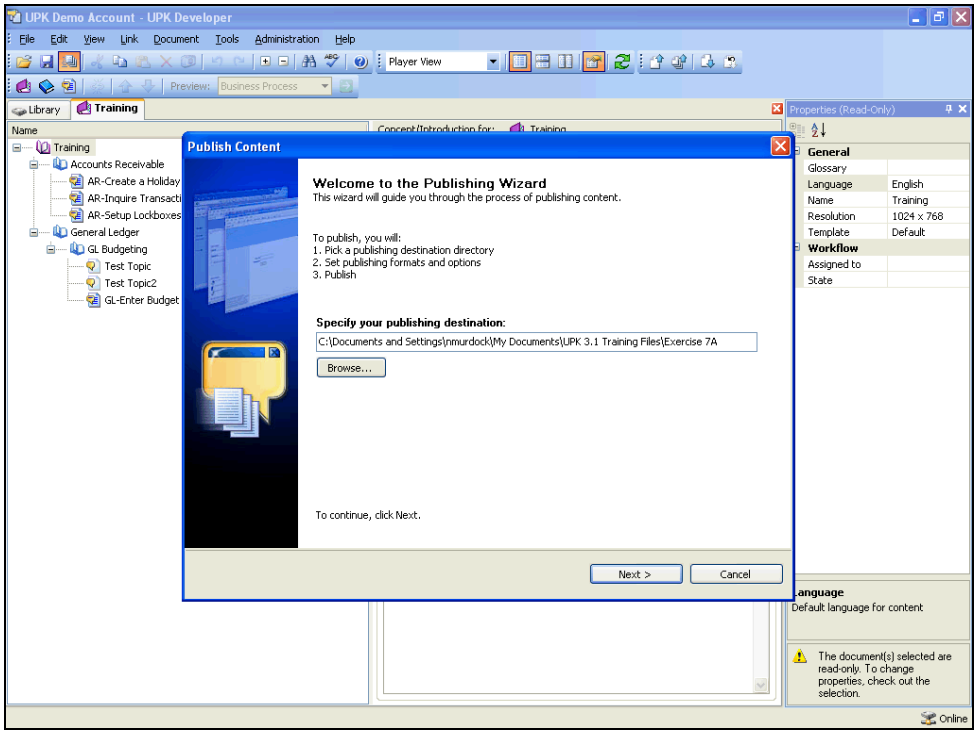
Prerequisites:

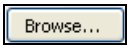
- **Existing content is available to deploy.**

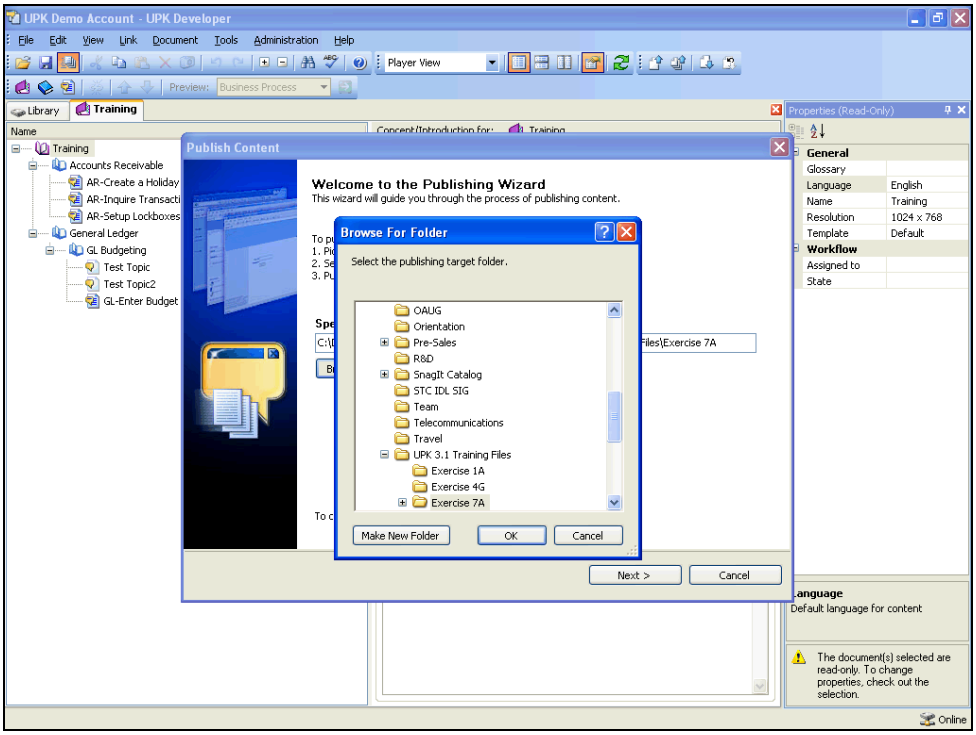
Step	Action
1.	**Navigate to your UPK Training folder and open the Training module in the Outline Editor.**



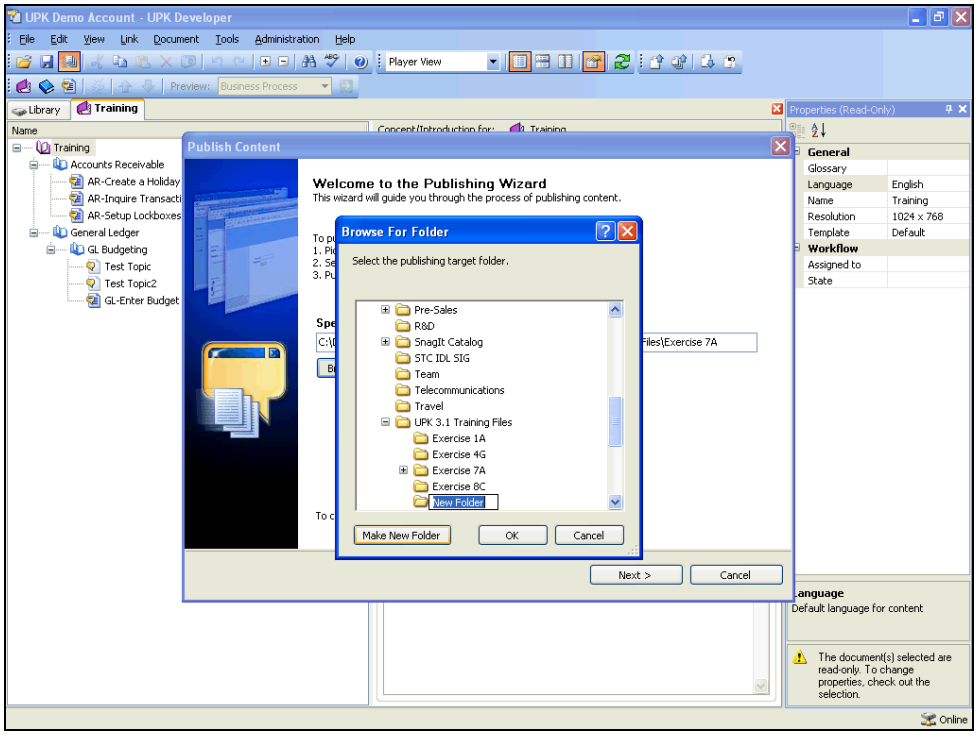
Step	Action
2.	**Publish content as a Business Process Document.** **Click on the PUBLISH icon.**



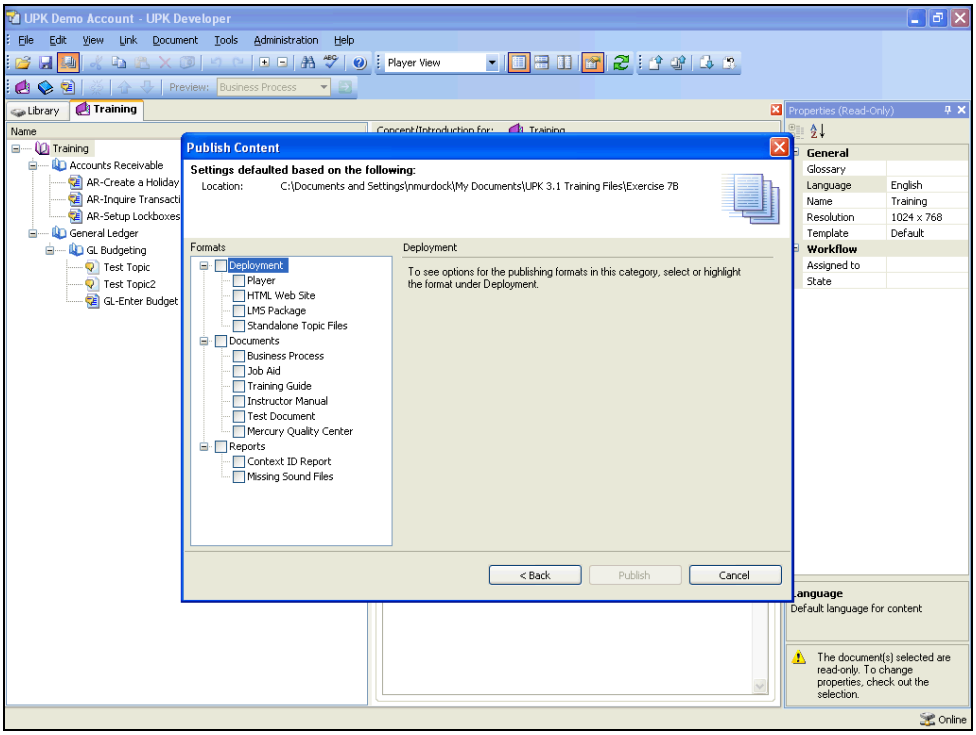
Step	Action
3.	**Choose a different publishing destination.** **Click on BROWSE.** 

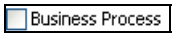


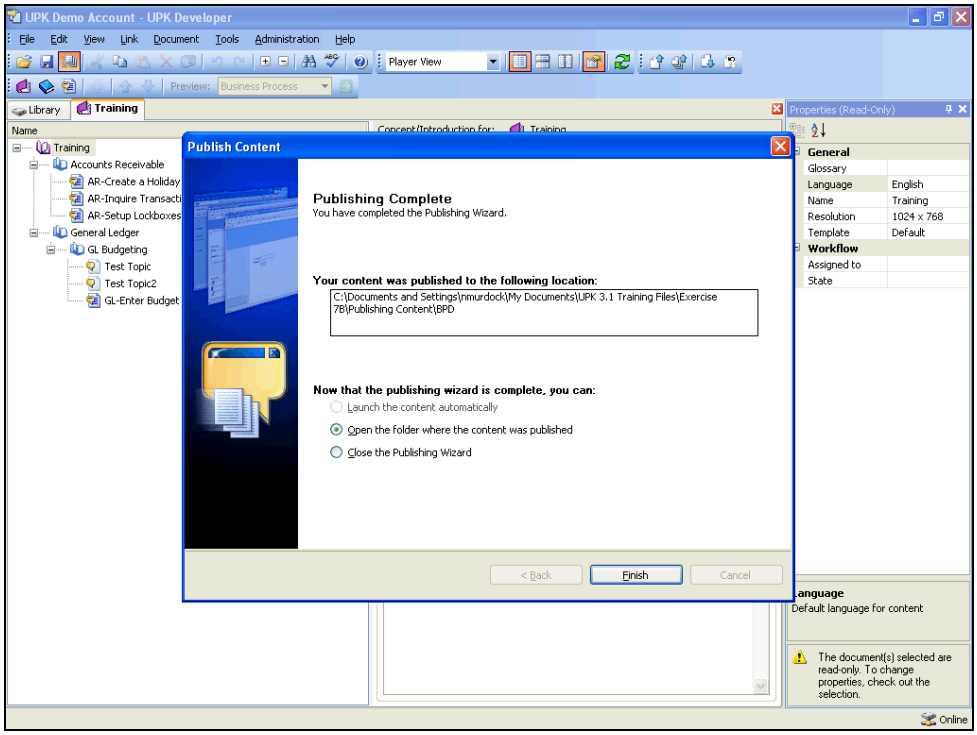
Step	Action
4.	**Click on MAKE NEW FOLDER.** Make New Folder



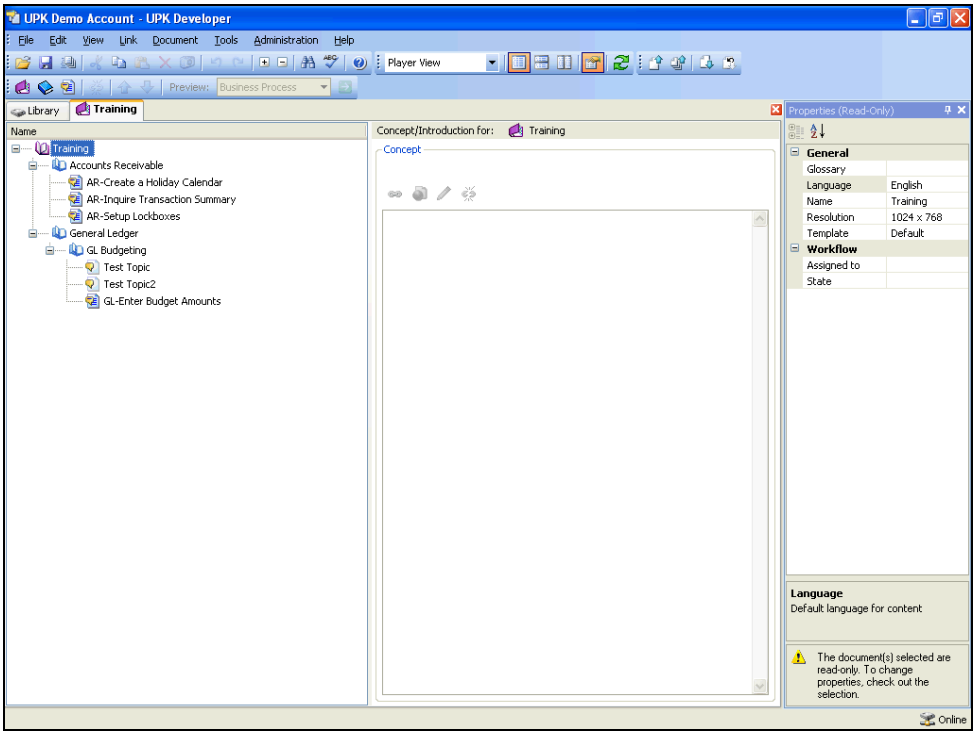
Step	Action
5.	**Type Exercise 7B in the NEW FOLDER field.**
6.	**Click on OK.** OK
7.	**Click on NEXT.** Next >
8.	**Click on NEXT.** Next >

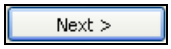
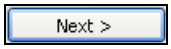


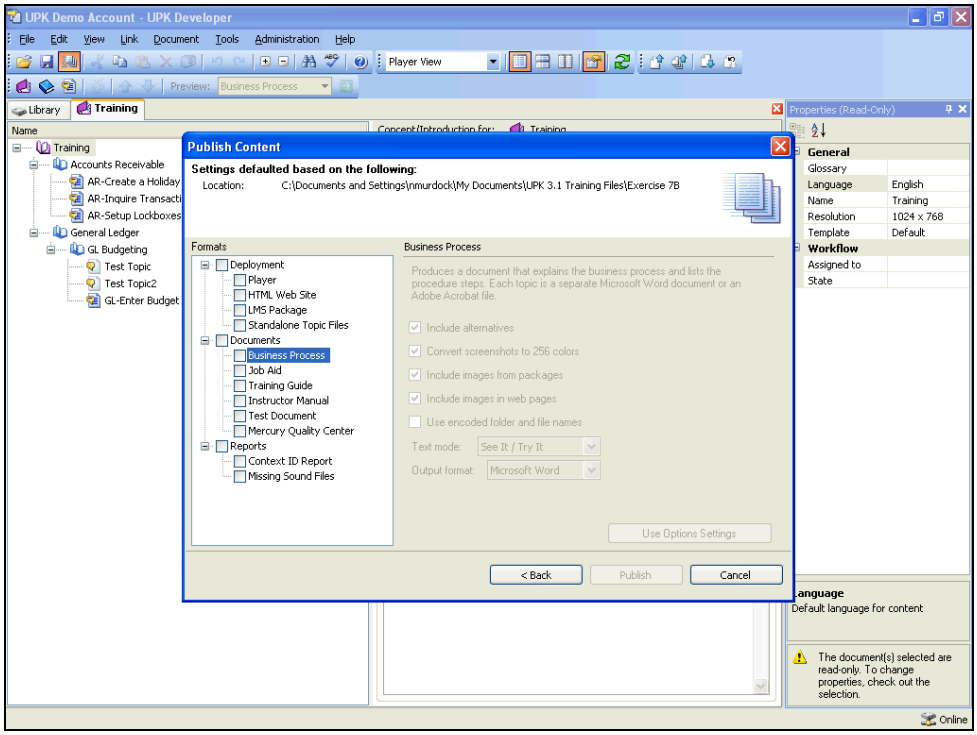
Step	Action
9.	**Click in the BUSINESS PROCESS checkbox.** 
10.	**Click on PUBLISH.**
11.	**UPK displays the publishing progress for the Business Process Document.**



Step	Action
12.	**Open the folder where the content was published.** **Click on FINISH.**
13.	**Open the documents and review.** **Close the window.**



Step	Action
14.	**Publish content as a Job Aid.** **Click on PUBLISH.**
15.	**Click on NEXT.** 
16.	**Click on NEXT.** 
17.	**De-select the Business Process.** **Click in the BUSINESS PROCESS checkbox.**



Step	Action
18.	**Click in the JOB AID checkbox.** Job Aid
19.	**Click on PUBLISH.** Publish
20.	**UPK displays the publishing progress for the Job Aid.**
21.	**Click on FINISH.** Finish
22.	**View the documents.** **Close the window.**
23.	**In this exercise, you learned how to publish content for a Business Process Document and Job Aid.** **End of Procedure.**