Roadmap to UPK 3.1 Session #1 UPK 3.1 Practice Exercises

> A Solbourne White Paper April 2008



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# Table of Contents

Roadmap to UPK 3.1 Session 1	1
Record a New Topic	
Creating Documents and Building an Outline	7
Deleting Content from the Library	14
Publishing for Deployment	
Publish for Print	



## 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.



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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.



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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.



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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.
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.

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



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.
4.	Click on the MODULE menu item.
5.	Type Training in the NAME field.
6.	Click the OK button.



Step	Action
7.	The <i>Training</i> 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.



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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.



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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.



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



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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 <i>Training</i> module.	
	Right-click the <i>Training</i> tab.	



Step	Action
35.	Click the CLOSE menu item.
36.	You are returned to the <i>Library</i> .
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.	



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Folders	Name	/ Checked out by	Last modified date	Version		
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🗉 💼 Import	AR Inquiry		1/14/2008 2:56:08 PM	New	Glossary	
🗟 🛅 Oracle 11i	General Ledger		1/14/2008 2:55:43 PM	New	Language	English
🖻 🧰 Oracle 11i_1	GL Budgeting		1/14/2008 2:56:11 PM	New	Resolution	$1024 \times 768$
🖻 🧰 System	V Test Topic		1/14/2008 2:55:53 PM	New	Template	Default
🖃 🧀 UPK 3.1 Class	V Test Topic2		1/14/2008 2:56:00 PM	New	U Workflow	
	V 🛃 Training	jd	1/14/2008 2:56:15 PM	New	Assigned to	
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Step	Action
4.	Right-click on the selection.



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🗊 🛅 Oracle 11i_1	✓ 🍫 GL Budgeting	- 0	id.	1/14/2008 2:56:11 PM	New	Resolution	1024 × 768
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🖃 🧁 UPK 3.1 Class	V Test Topic2	2	New Eolder	/14/2008 2:56:00 PM	New	😑 Workflow	,
	V🛃 Training	1	Check In	/14/2008 2:56:15 PM	New	Assigned t	0
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Step	Action
5.	Click the CHECK IN menu item.
	Check In



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🗉 🧰 System	V Test Topic	jd	1/14/2008 2:55:53 PM	New	Template	Default
🖨 🗁 UPK 3.1 Class	V Test Topic2	jd	1/14/2008 2:56:00 PM	New	Workflow	
	V 🛃 Training	jd	1/14/2008 2:56:15 PM	New	Assigned to	
😟 🛅 WSSC	Check In Comment				State	
	Provide check in comments for 'Acc     Apply same comment to all doc	uments	Cancel	×	Clossary Link to glossary ter properties wil original value	ms document overwrite the s.

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



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🕀 🧰 Import	AR Inquiry	1/14/2008 2:58:34 PM	1	Glossary	
🗈 🛅 Oracle 11i	Seneral Ledger	1/14/2008 2:58:35 PM	1	Language Englis	n i
🕀 🫅 Oracle 11i_1	GL Budgeting	1/14/2008 2:58:35 PM	1	Resolution 1024 :	< 768
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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.

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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.
	Skip advanced options page
7.	Click on NEXT.



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🖨 — 🕼 Accounts Receivable		Glossary	
AR-Create a Holiday	Select Publishing Options	Language	English
🔤 AR-Inquire Transacti	Set the advanced options to be used for this publishing process.	Name	Training
AR-Setup Lockboxes		Resolution	1024 × 768
🖻 — 🕼 General Ledger		Template	Default
😑 💫 GL Budgeting		Workflow	
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	Category and Language	State	
📖 🔃 GL-Enter Budget	Category: User Productivity Kit Change		
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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.



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E 0 Training	Publish Content		General	
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AR-Inquire Transacti			Name	Training
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Step	Action
9.	Click the PLAYER checkbox.



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🖃 ···· 🙋 Training	Publish Content		General	
🖨 — 🔱 Accounts Receivable	Settings defaulted based on the follow	vina:	Glossary	
🔤 🖓 AR-Create a Holiday	Location: C:\Documents and Settine	igs\nmurdock\My Documents\UPK 3.1 Training Files\Exercise 7A	Language	English
🔤 AR-Inquire Transacti			Name	Training
🔤 AR-Setup Lockboxes	4		Resolution	$1024 \times 768$
🛓 🔱 General Ledger			Template	Default
🖮 🔱 GL Budgeting	Formats	Player	Workflow	
	🖃 🔲 Deployment	Publishes content that can be viewed through the Player.	Assigned to	
	🗹 Player		State	
🛄 GL-Enter Budget	HTML Web Site	Include sound mes		
_	LMS Package	Convert screenshots to 256 colors		
	Documents	Create links for backward compatibility		
	Business Process	Presentation Options		
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	Training Guide	Play audio:		
	Instructor Manual	All available sound		
	Test Document	Show introduction text		
	Mercury Quality Center	Enable users to change their Player preferences		
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	Context ID Report			
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Step	Action
10.	Optional. Change the default settings.
	Click on 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.



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			Language Default language for content
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Step	Action
13.	The Player Package displays in its own Browser window.
	Expand the outline.
	Click the [+] icons.
14.	Close the Player window.



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🔤 AR-Create a Holiday Calendar			Language	English
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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.
	LMS Package



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🔛 🧟 AR-Inquire Transacti			Name Training
R-Setup Lockboxes			Resolution 1024 × 768
😑 🔱 General Ledger	<b>F</b>		Template Default
🖃 🔱 GL Budgeting	Formats	LMS Package	Workflow
	Deployment	Publishes content as a package ready to be distributed to an LMS.	Assigned to
V Test Topic2	HTML Web Site		state
GL-Enter Budget	LMS Package	Include cound files	
	Standalone Topic Files	Convert screenshots to 256 colors	
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	Instructor Manual	Prefix URL:	
	Test Document		
	Mercury Quality Center		
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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.



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	Certificate	File Folder	1/16/2008 4:29 PM		Language	English
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🔕 Publish this folder to the	Chelp	File Folder	1/16/2008 4:29 PM		Resolution	1024 x 768
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	imsmanifest.xml	28 KB XML Document	1/16/2008 4:29 PM			
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Step	Action
23.	View the file structure for the LMS SCORM package.
	Close the window.



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Accounts Receivable		Glossary	
🔛 AR-Create a Holiday Calendar		Language	English
AR-Inquire Transaction Summary	··· · · · · · · · · · · · · · · · · ·	Name	Training
AR-Setup Lockboxes		Resolution	1024 × 768
General Ledger		Template	Default
E GL Budgeting		Workflow	
Test Topic		Assigned to Shake	
Test Topic2		State	
		Language Default language fo	or content
		The documer read-only. To properties, ch selection.	t(s) selected are change eck out the
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Step	Action
24.	Publish content to a standalone HTML web site.
	Click on PUBLISH.
25.	Click on NEXT. Next >
26.	Click on NEXT. Next >
27.	De-select the LMS Package option.
	Click on LMS PACKAGE.
	LMS Package
28.	Click on the HTML WEB SITE checkbox.
	HTML Web Site



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🖃 🖳 🕡 Training	Publish Content	General	
🚊 — 🔱 Accounts Receivable	Settings defaulted based on the following:	Glossary	
🔤 🖓 AR-Create a Holiday	Location: C:\Documents and Settings\nmurdock\My Documents\UPK 3.1 Training Files\Exercise 7A	Language	English
🔤 🖓 AR-Inquire Transacti		Name	Training
AR-Setup Lockboxes		Resolution	1024 × 768
🖮 🛄 General Ledger		Template	Default
🖮 🔱 GL Budgeting	Formats HTML Web Site	Workflow	
	Deployment     Publishes content as series of static HTML files.	Assigned to	
		State	
GL-Enter Budget	MMS Declara		
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	Training Guide		
	Instructor Manual		
	Test Document		
	Mercury Quality Center		
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	Context ID Report		
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		properties, che	ck out the
		selection.	
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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.





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



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🚊 — 🔱 Accounts Receivable			Glossary	
🔤 AR-Create a Holiday Calendar			Language	English
	🕬 🜒 🖉 👷		Name	Training
AR-Setup Lockboxes		~	Resolution	$1024 \times 768$
🖮 — 🚇 General Ledger			Template	Default
🖮 🛶 💵 GL Budgeting			😑 Workflow	
			Assigned to	
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			Language Default language	for content
		*	read-only. T properties, o selection.	o change check out the
				9 m

Action
Publish the content to stand alone topic files.
Click the PUBLISH icon.
Click on NEXT. Next >
Click on NEXT. Next >
De-select the HTML Web Site option.
Click in the HTML WEB SITE checkbox.
Click in the STANDALONE TOPIC FILES checkbox.



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Name	Con	cept/Introduction for: 📣 Training		2↓	
🖃 🙋 Training	Publish Content			General	
😑 — 🔱 Accounts Receivable	Settings defaulted based on the follow	ving:		Glossary	
🔤 AR-Create a Holiday	Location: C:\Documents and Settin	gs\nmurdock\My Documents\UPK 3.1 Training Files\Exercise 7A		Language	English
🔤 AR-Inquire Transacti	i i			Name	Training
				Resolution	$1024 \times 768$
🛓 🕼 General Ledger				Template	Default
😑 🔱 GL Budgeting	Formats	Standalone Topic Files		Workflow	
🤍 🖓 Test Topic	Deployment	Publishes content as standalone topic files.		Assigned to	
	Player			State	
🛄 GL-Enter Budget	HTML Web Site				
	EMS Package	Include sound files			
	Documents	Convert coreanshots to 256 colors			
	Business Process	Convert screenshots to 256 cours			
	Job Aid	Use encoded folder and file names			
	Training Guide	Include setup for topic player			
	- Instructor Manual	E monte coup in topo payor			
	Test Document				
	Mercury Quality Center				
	Reports				
	Context ID Report				
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				properties, che	sck out the
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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.
	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.

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Accounts Receivable	Concept	General	
AR-Create a Holiday Calendar		Language	English
AR-Inquire Transaction Summary	🚥 🌒 🥂 🄅	Name	Training
AR-Setup Lockboxes		Resolution	1024 × 768
🖕 🕼 General Ledger		Template	Default
😑 🔱 GL Budgeting		Workflow	
		Assigned to	
		State	
GL-Enter Budget Amounts			
		Language	
		Default language for	r content
		1 The document	(s) selected are
		properties, che	ck out the
		selection.	
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Step	Action
2.	Publish content as a Business Process Document.
	Click on the PUBLISH icon.



Step	Action
3.	Choose a different publishing destination.
	Browse



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🚊 — 🕼 Accounts Receivable		Glossary	
AR-Create a Holiday	Welcome to the Publishing Wizard	Language	English
AR-Inquire Transacti	This wizard will guide you through the process of publishing content.	Name	Training
AR-Setup Lockboxes		Resolution	1024 x 768
- Coneral Ledger	Browse For Folder	Template	Default
🖨 — 🕼 GL Budgeting	1. Pic	Workflow	
Test Topic	2, Se Select the publishing target folder.	Assigned to	
Test Topic2	3. Pu	State	
GI -Enter Budget			
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	Exercise 1A		
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	Make New Folder OK Cancel		
	Next > Cancel		
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Step	Action
4.	Click on MAKE NEW FOLDER. Make New Folder



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Accounts Receivable		Glossary	
🔤 AR-Create a Holiday	Welcome to the Publishing Wizard	Language	English
🔤 AR-Inquire Transacti	This wizard will guide you through the process of publishing content.	Name	Training
AR-Setup Lockboxes		Resolution	$1024 \times 768$
😑 — 🔱 General Ledger	To pu Browse For Folder	Template	Default
🖮 🚇 GL Budgeting	1. Pic	Workflow	
	2, Se Select the publishing target folder.	Assigned to	
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	Next > Cancel		
		anguage	
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		selection.	🔀 Onli

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



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🔤 🖓 AR-Create a Holiday	Location: C:\Documents and Settin	ias\nmurdock\Mv Documents\UPK 3.1 Training Files\Exercise 7B	Language	English
🔤 🖓 AR-Inquire Transacti			Name	Training
🔛 🧟 AR-Setup Lockboxes	4		Resolution	$1024 \times 768$
🖮 — 🔱 General Ledger			Template	Default
😑 💫 GL Budgeting	Formats	Deployment	Workflow	
	Deployment	To see options for the publishing formats in this category, select or highlight	Assigned to	
	Player	the format under Deployment.	State	
📖 😪 GL-Enter Budget	IMS Package			
	Standalone Topic Files			
	Documents			
	Business Process			
	🛄 Job Aid			
	Training Guide			
	Instructor Manual			
	Mercury Quality Center			
	Reports			
	Context ID Report			
	Missing Sound Files			
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			properties, che	ck out the
			selection.	
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Step	Action
9.	Click in the BUSINESS PROCESS checkbox.
	Business Process
10.	Click on PUBLISH.
	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.



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🔛 🔁 AR-Create a Holiday Calendar		Language	English
AR-Inquire Transaction Summary		Name	Training
R-Setup Lockboxes		Resolution	1024 × 768
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V Test Topic		Assigned to State	
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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.



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AR-Setup Lockboxes			Resolution 1024 × 768
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🚊 — 🔱 GL Budgeting	Formats	Business Process	Workflow
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Test Topic2	- Player	procedure steps. Each topic is a separate Microsoft Word document or an	State
GL-Enter Budget	HTML Web Site	Adobe Acrobat file.	
	LMS Package		
	Standalone Topic Files	Include alternatives	
	Documents     Documents	Convert screenshots to 256 colors	
	Job Aid		
	Training Guide	Include images from packages	
	Instructor Manual	Include images in web pages	
	Test Document		
	Mercury Quality Center	Use encoded folder and file names	
	🖻 🔲 Reports	Text mode: See It / Try It 🔹	
	- Context ID Report	Onders & General Minner of Billing and	
	Missing Sound Files	Output format: Microsoft word	
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Step	Action
18.	Click in the JOB AID checkbox.
19.	Click on PUBLISH. Publish
20.	UPK displays the publishing progress for the Job Aid.
21.	Click on 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.