

Roadmap to UPK 3.1 Session #1
UPK 3.1 Practice Exercises

A Solbourne White Paper
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Table of Contents

| | |
|---|-----------|
| Roadmap to UPK 3.1 Session 1..... | 1 |
| Record a New Topic..... | 1 |
| Creating Documents and Building an Outline | 7 |
| Deleting Content from the Library | 14 |
| Publishing for Deployment..... | 19 |
| Publish for Print..... | 35 |

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.

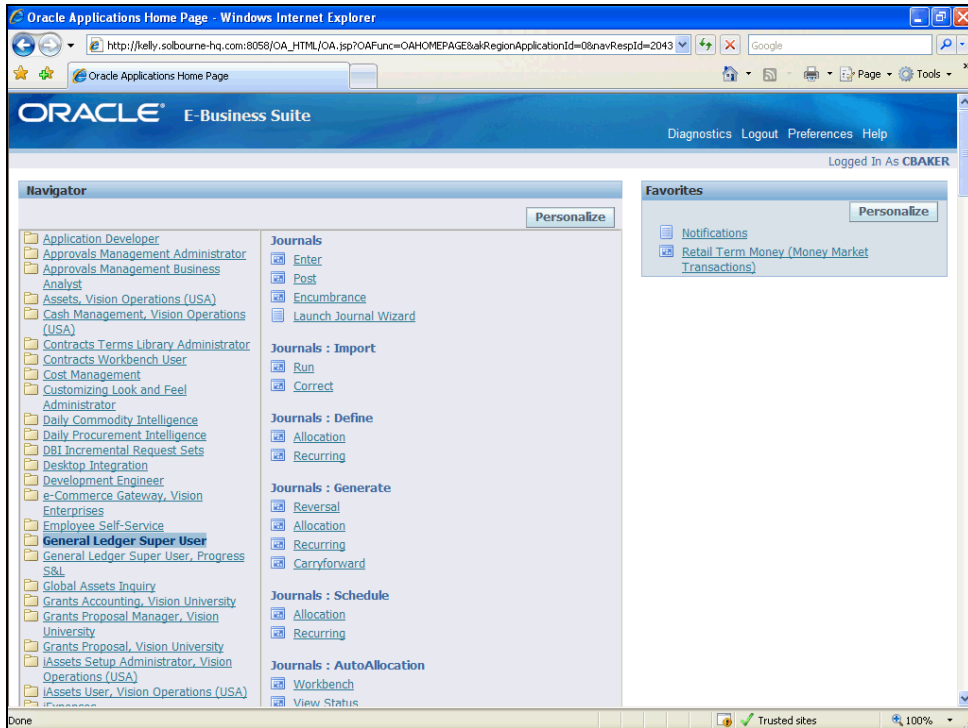
About the Sample Data:

This procedure records a new GL topic for entering budget amounts.

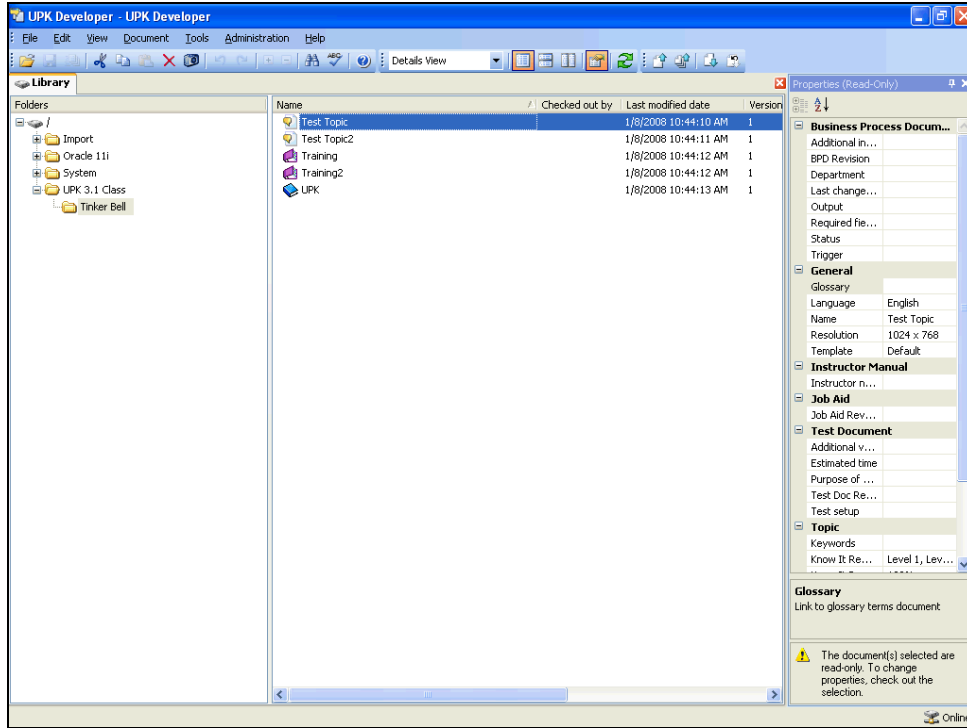
Prerequisites:

- 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.

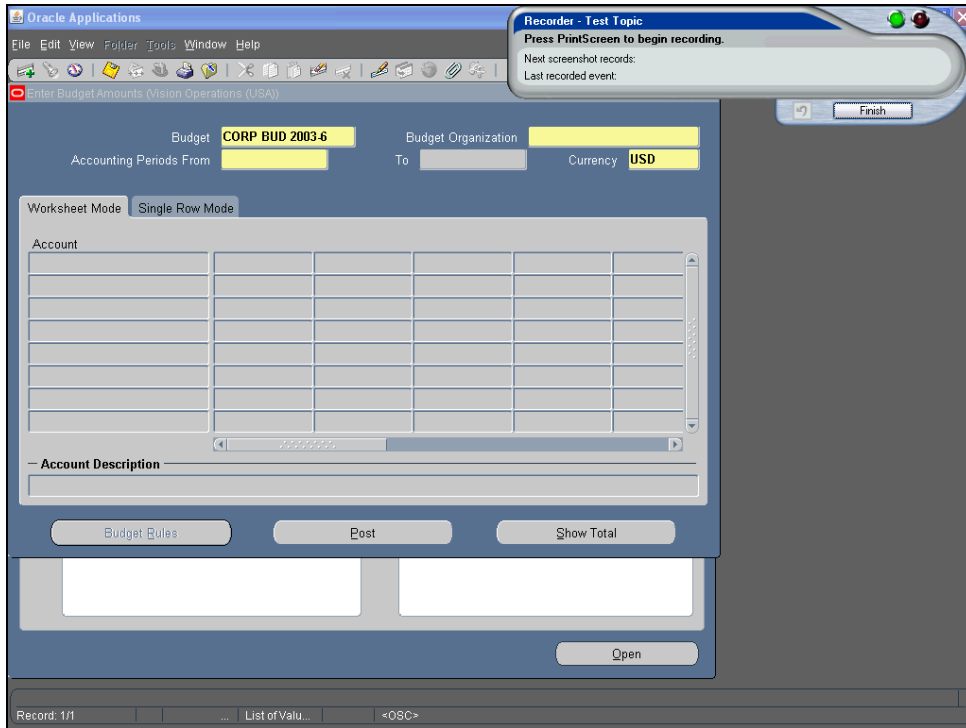
| Step | Action |
|------|--|
| 1. | To complete this procedure, follow the menu path: START > PROGRAMS > USER PRODUCTIVITY KIT CLIENT > UPK DEVELOPER CLIENT > LIBRARY > YOUR UPK CLASS FOLDER. |





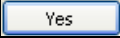
| Step | Action |
|------|--|
| 2. | <p>Before you begin, choose a task in Oracle to record.</p> <p>In this example, the GL task to enter a budget has been used.</p> |



| Step | Action |
|------|--|
| 3. | In your UPK class folder, double-click TEST TOPIC to begin recording. |
| 4. | <p>Because the document was not checked out, UPK asks you whether to check it out now.</p> <p>Click the Yes button.</p> <div style="border: 1px solid black; padding: 2px; display: inline-block;">Yes</div> |



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

| 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:

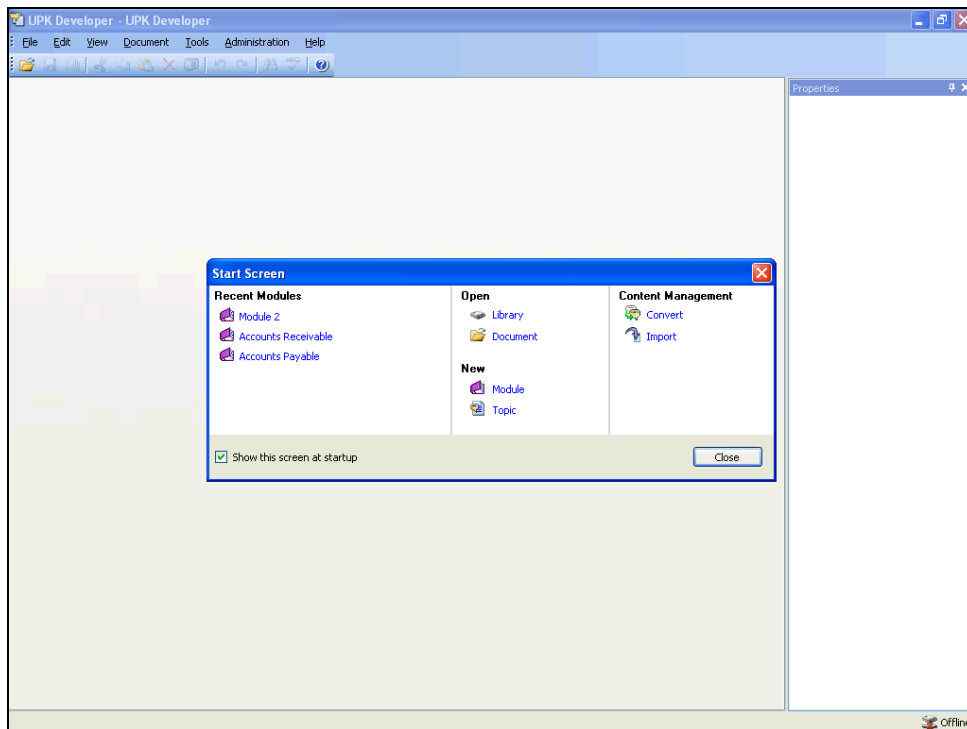
By the end of this exercise, you will be able to do the following:

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

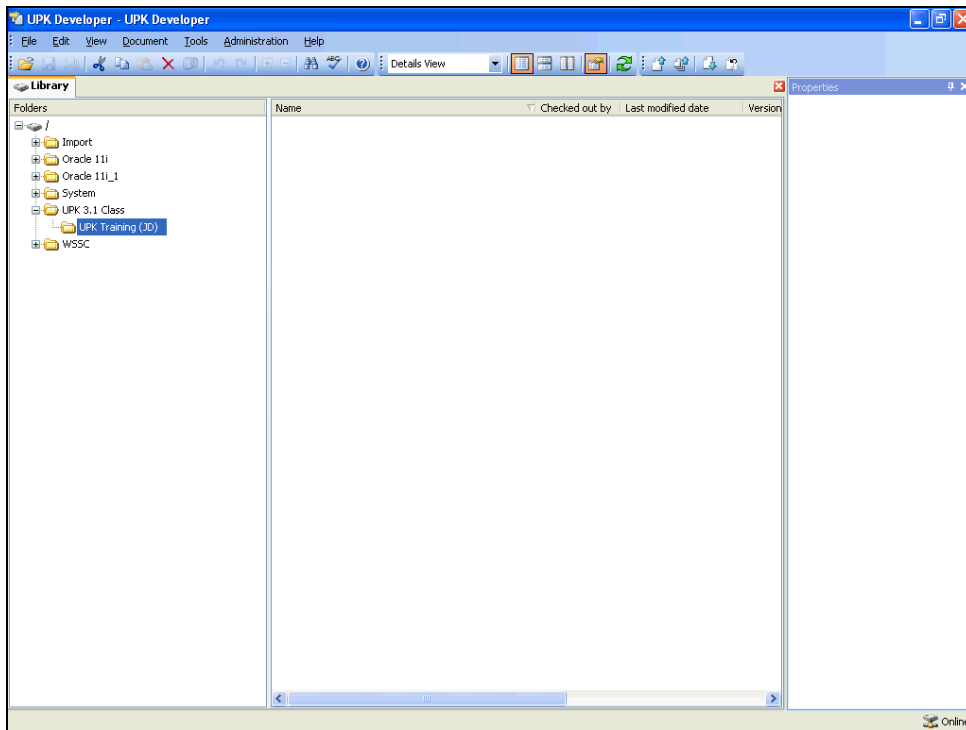
Prerequisites:

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






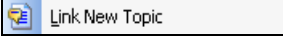
| Step | Action |
|------|--|
| 1. | <p>To complete this procedure, go to the menu path:</p> <p>START > PROGRAMS > USER PRODUCTIVITY KIT CLIENT > UPK DEVELOPER CLIENT.</p> |

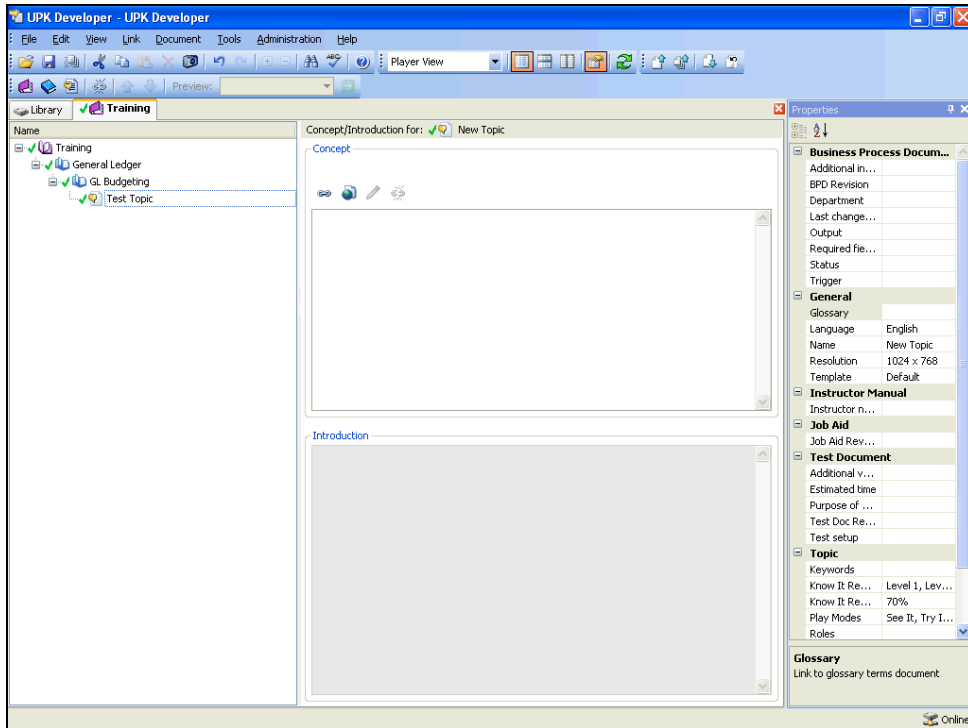


| Step | Action |
|------|---|
| 2. | <p>Open the UPK Developer Library.</p> <p>Click the LIBRARY link.</p> <p><input type="button" value="Library"/></p> |

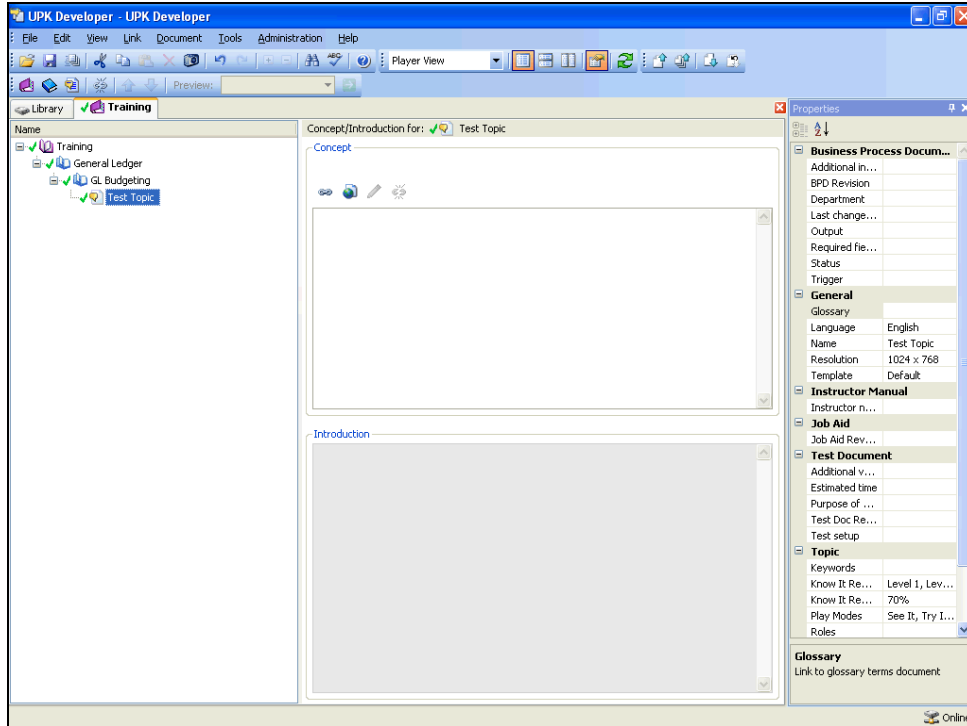


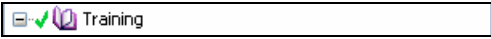



| Step | Action |
|------|---|
| 3. | <p>Documents can be created in the library or they can be created while in the outline editor.</p> <p>First, from the library, select your UPK 3.1 Class training folder you created in Module 1. Create a new module.</p> <p>Click on the FILE menu.</p> <p><input type="button"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

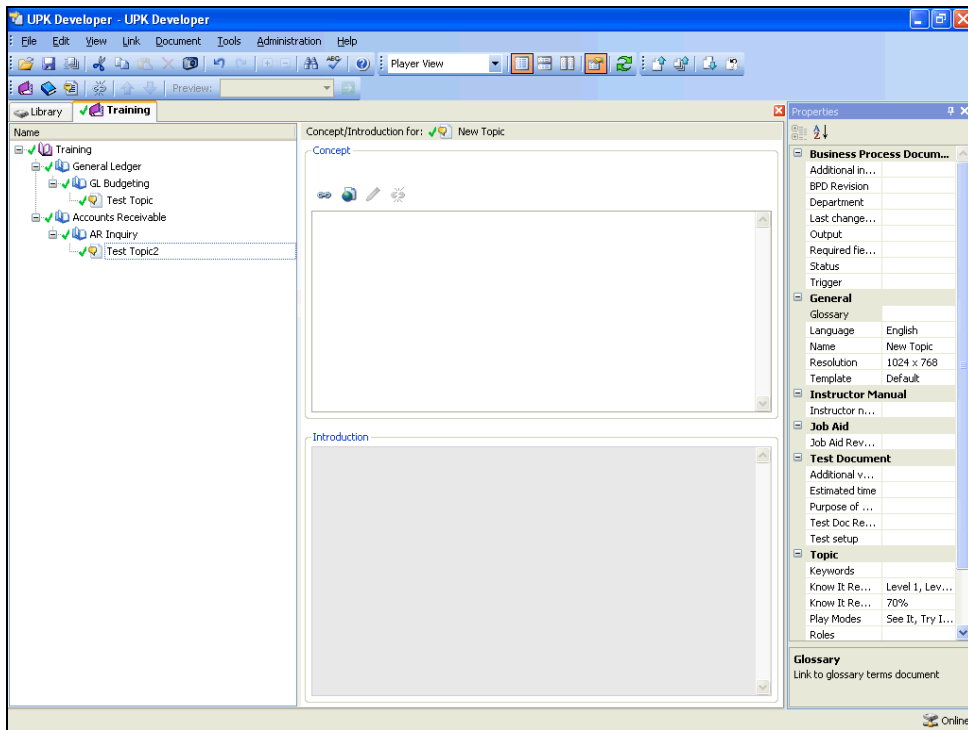
| Step | Action |
|------|---|
| 7. | <p>The <i>Training</i> module opens in a new tab and is automatically checked out to you as it is a new document.</p> <p>Link a new section under the Training module.</p> <p>Right-click on the TRAINING module.</p>  |
| 8. | <p>Click the LINK NEW SECTION menu item.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



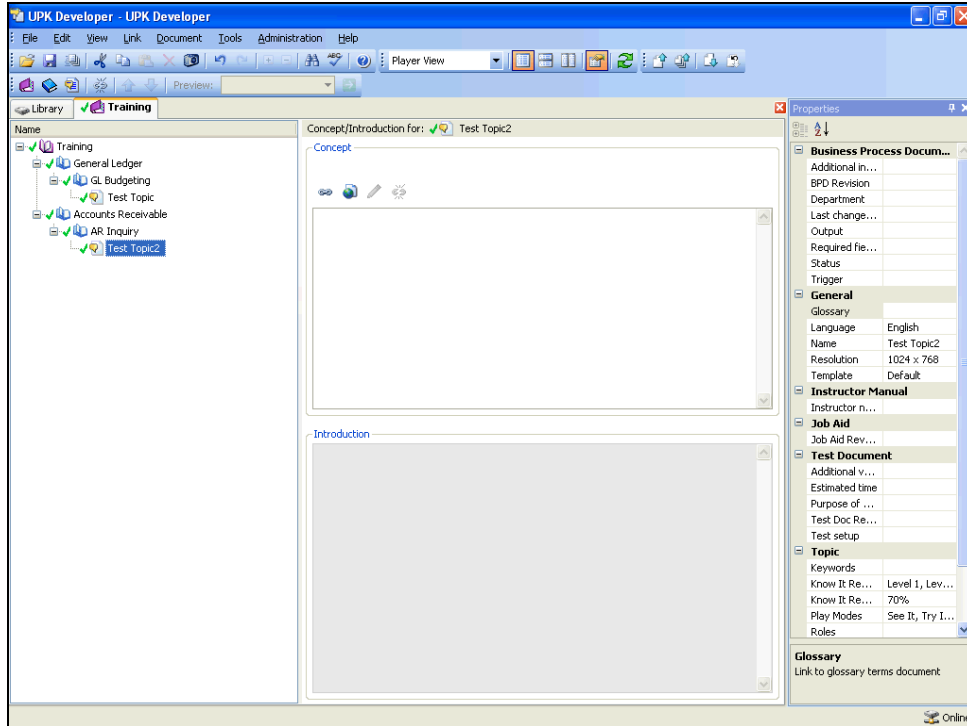
| Step | Action |
|------|---|
| 18. | <p>The new topic will automatically be stored in the library folder in which the module is located in.</p> <p>Press [Enter] to accept the text.</p> |









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



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



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

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

Deleting Content from the Library

Procedure

Objective:

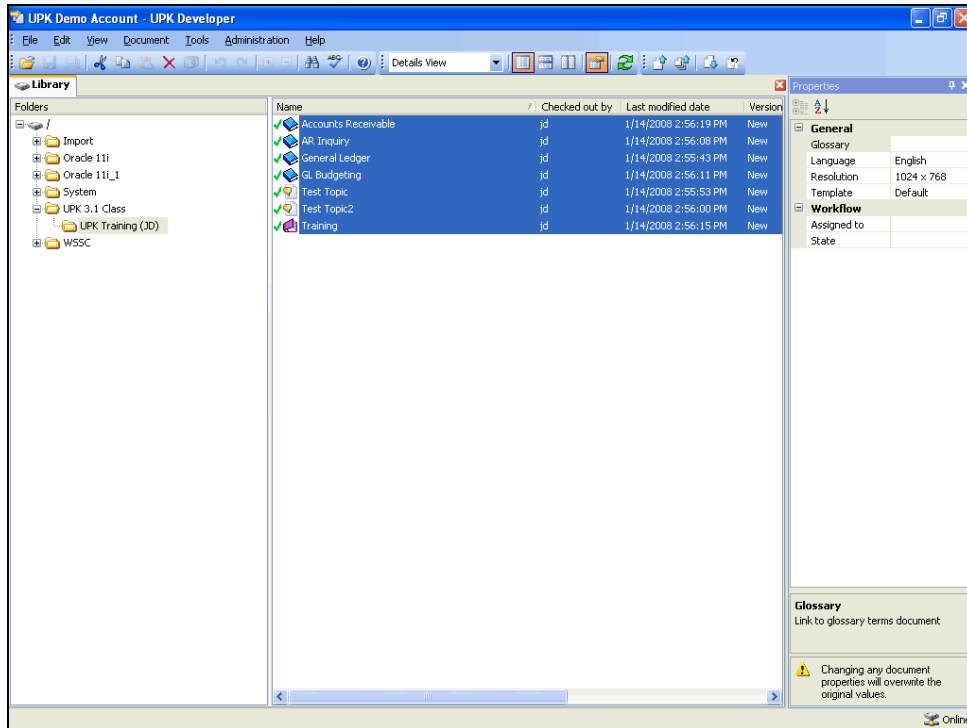
By the end of this exercise, you will be able to do the following:

- Delete content from the library

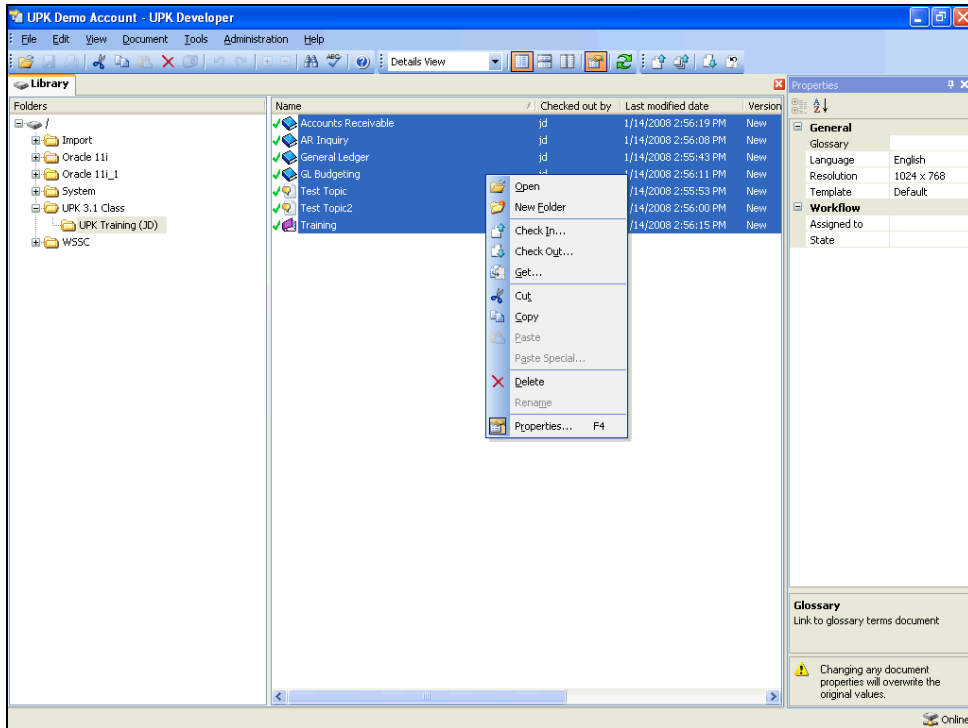
Prerequisites:

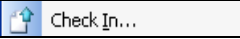
- UPK 3.1 was installed successfully.

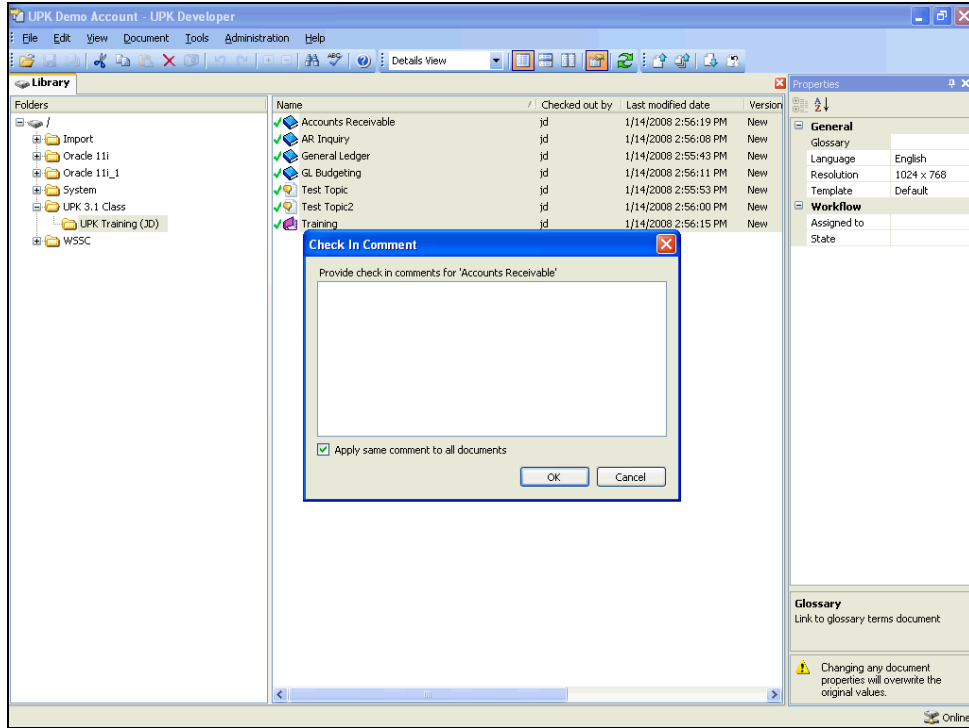
| Step | Action |
|------|---|
| 1. | <p>To complete this procedure, go to the menu path:</p> <p>START > PROGRAMS > USER PRODUCTIVITY KIT CLIENT > UPK DEVELOPER CLIENT > LIBRARY TAB.</p> |
| 2. | <p>Delete a section in your UPK Training folder using a toolbar icon.</p> <p>First, the content must be checked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

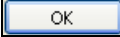


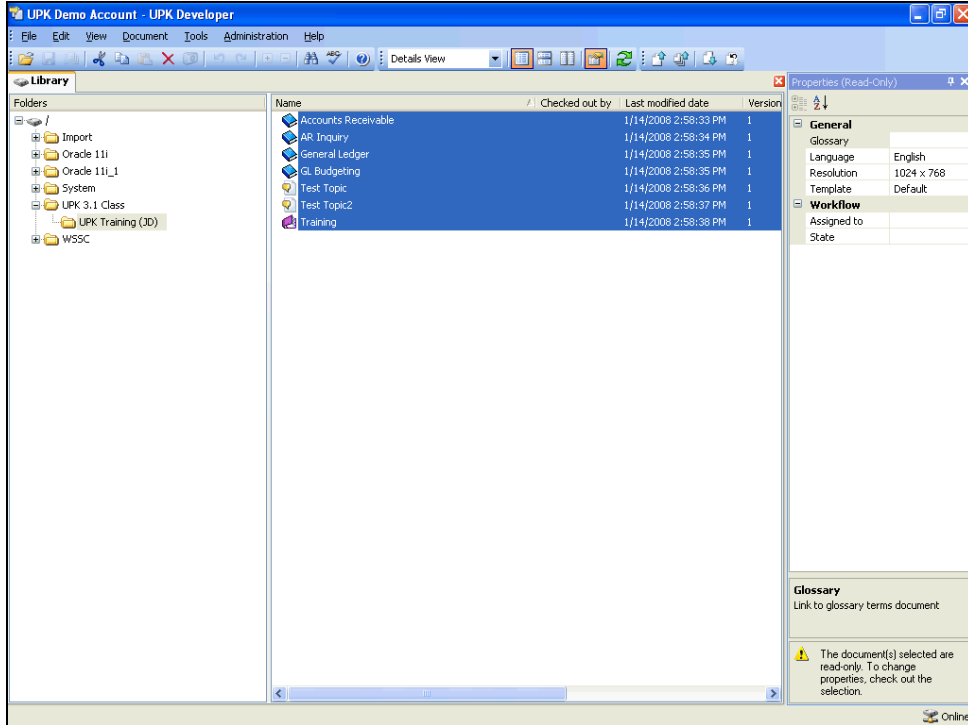
| Step | Action |
|------|--------------------------------------|
| 4. | Right-click on the selection. |


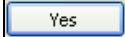


| Step | Action |
|------|---|
| 5. | <p>Click the CHECK IN menu item.</p>  |



| 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. | <p>Delete a section using a toolbar icon.</p> <p>Click the AR INQUIRY section in the list.</p> |
| 10. | <p>Click on the DELETE icon.</p>  |
| 11. | <p>Confirm the deletion.</p> <p>Click on YES.</p>  |
| 12. | <p>In this exercise, you learned how to manage library content.</p> <p>End of Procedure.</p> |

Publishing for Deployment

Procedure

Objective:

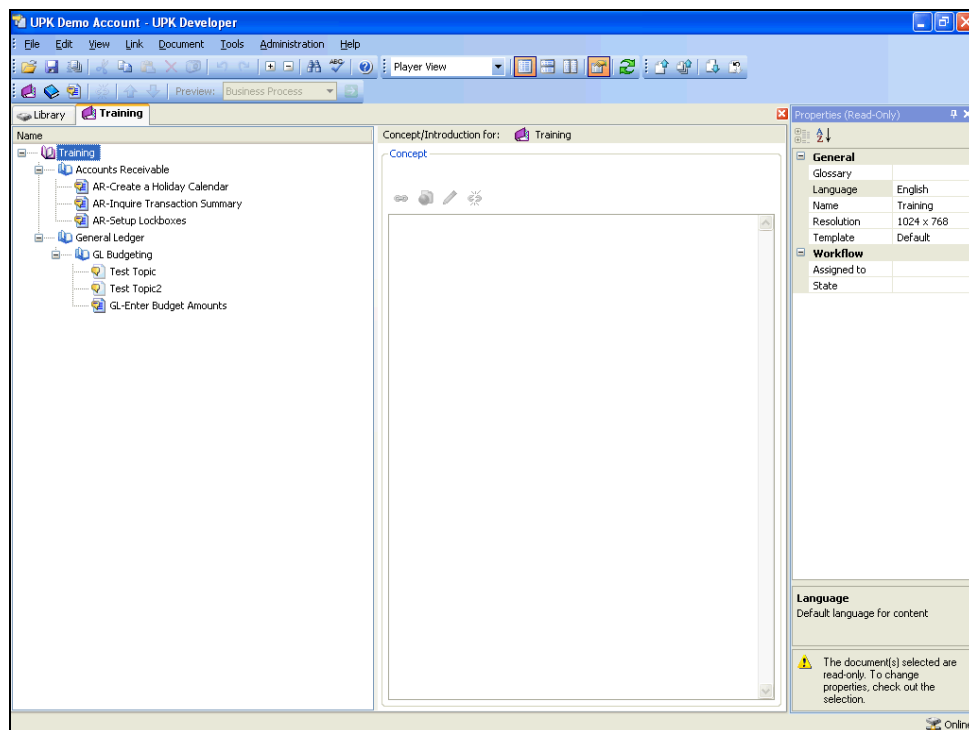
By the end of this exercise, you will be able to publish content the following deployment options:


- 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.

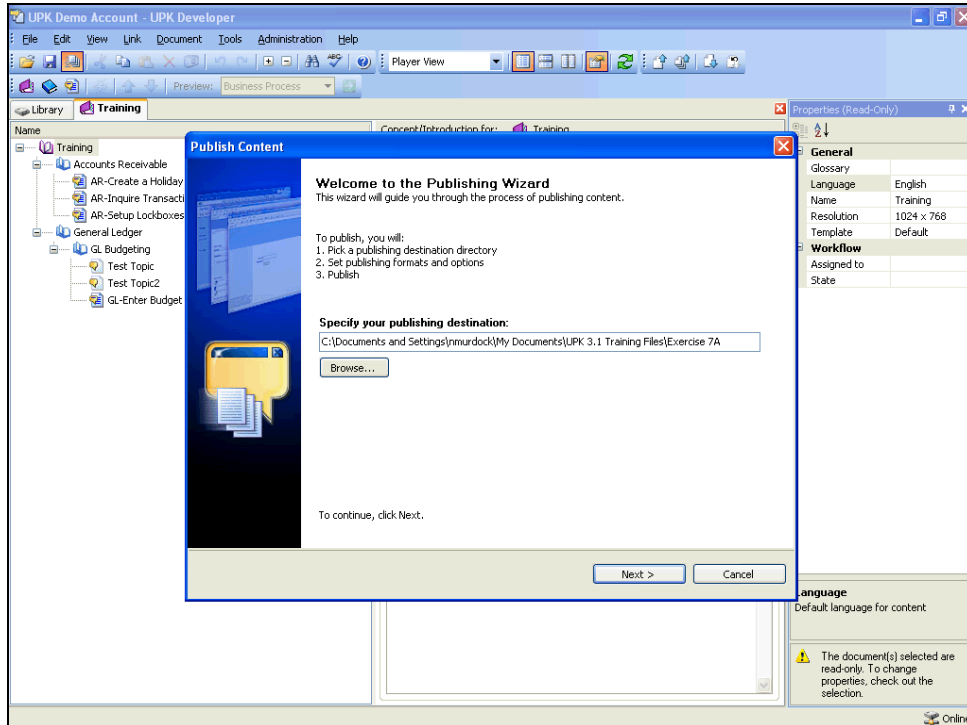
Prerequisites:


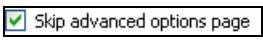

- Existing content is available to deploy.

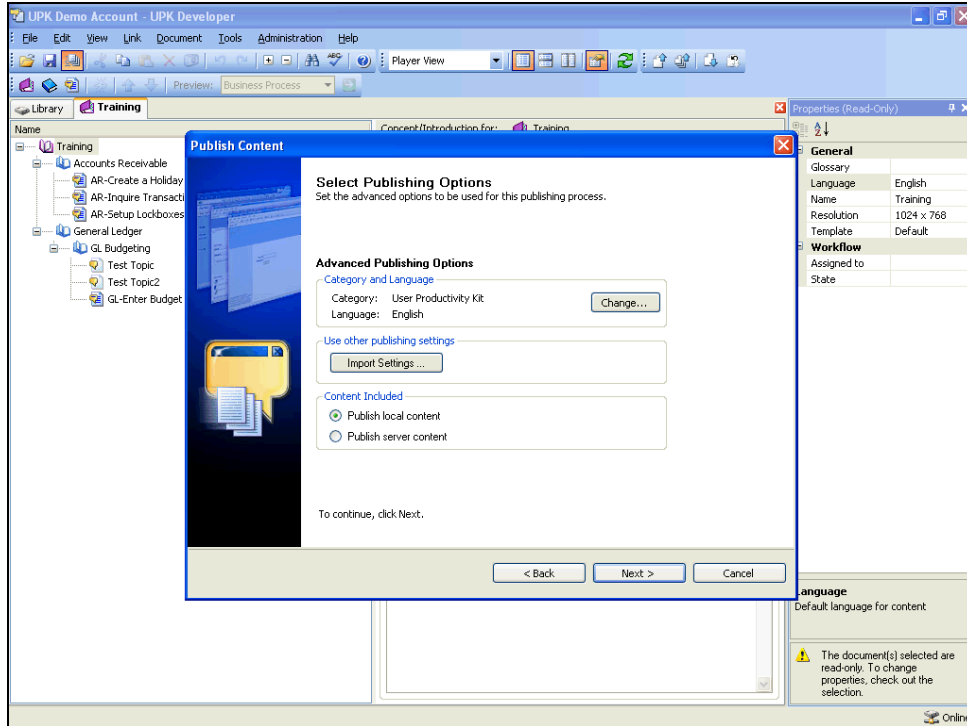
| Step | Action |
|------|---|
| 1. | Navigate to your UPK Training folder. |
| 2. | Open the Training module. Double-Click on TRAINING. |
| 3. | Expand all levels of the Training module. |



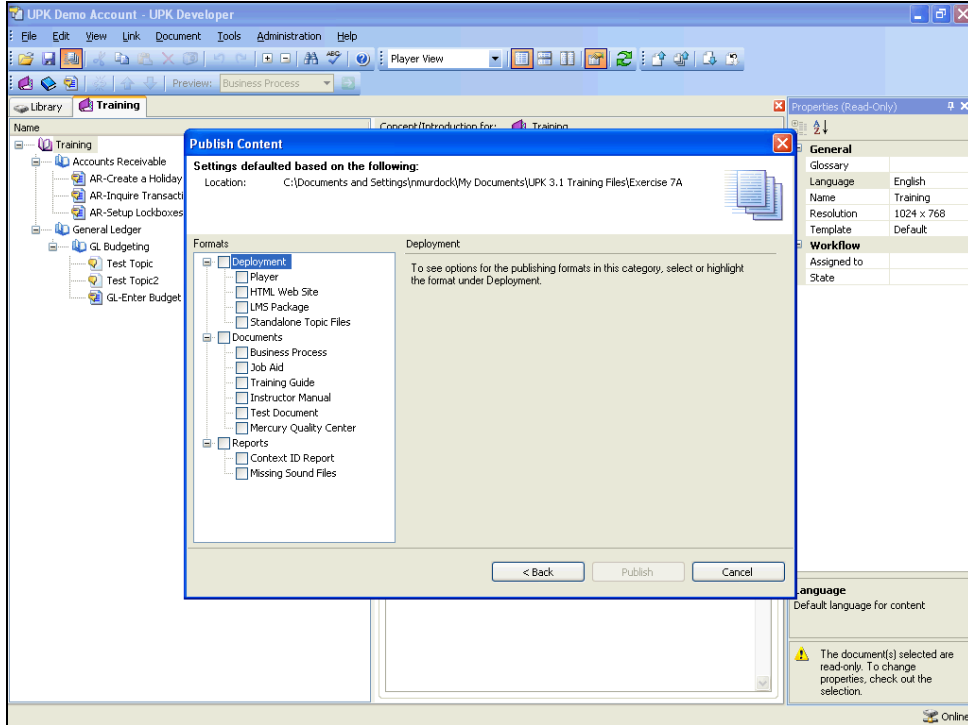
| Step | Action |
|------|---|
| 4. | <p>Publish the Training module.</p> <p>Click on the PUBLISH icon.</p>  |




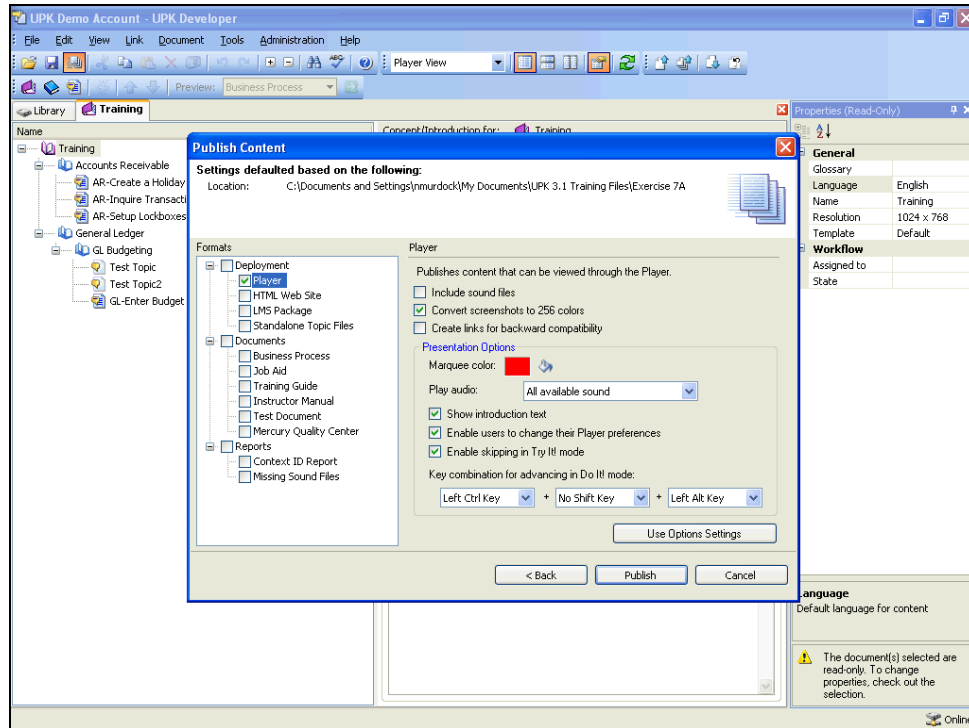
| Step | Action |
|------|--|
| 5. | <p>Accept the default destination directory or change it to another location.</p> <p>Click on NEXT.</p>  |
| 6. | <p>Choose whether to publish the selection or the entire outline shown in the Outline Editor.</p> <p>De-select the default checkbox for skipping advanced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



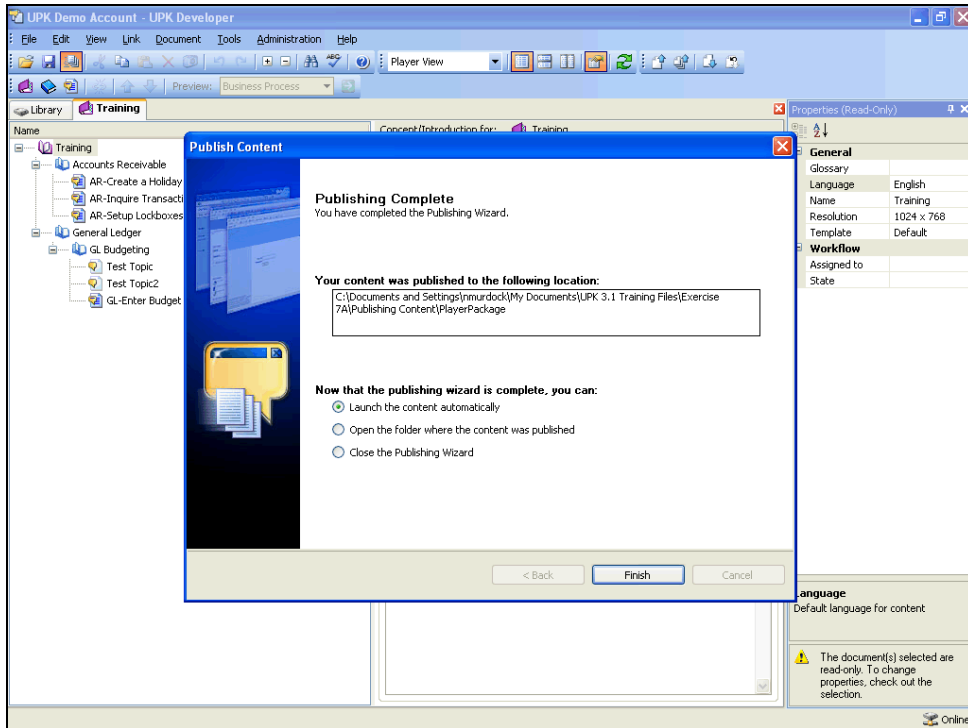
| Step | Action |
|------|---|
| 8. | <p>Optional. Review and modify the selections for advanced publishing options for logos and formatting (category), language, import settings from an external location, and checked in/out document versions (local vs. server).</p> <p>Click on NEXT.</p> <div style="border: 1px solid black; padding: 2px; display: inline-block;">Next ></div> |




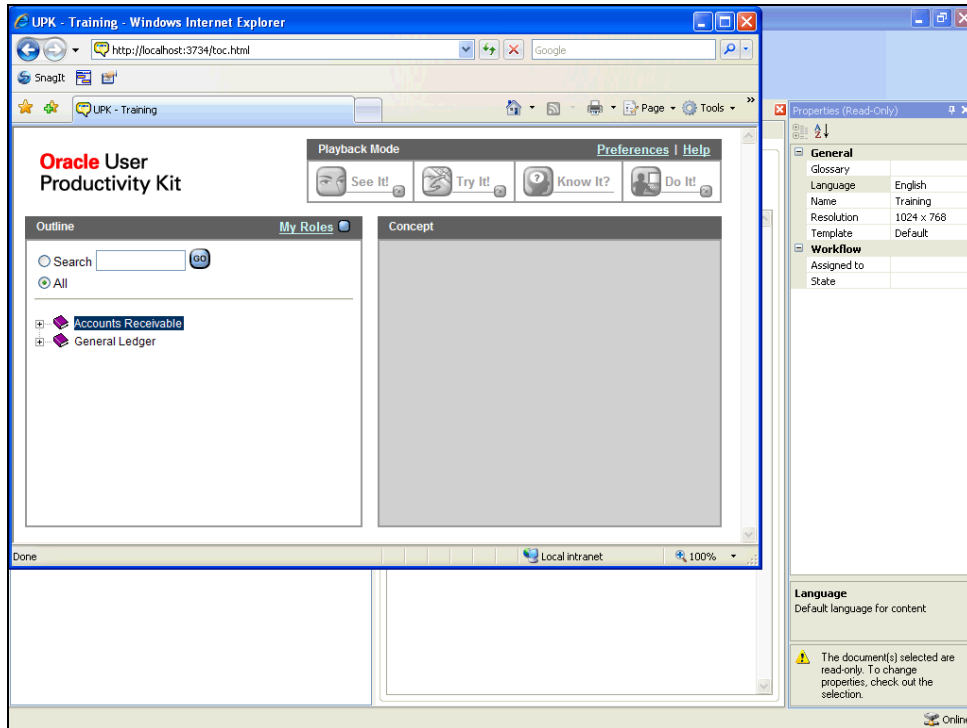
| Step | Action |
|------|--|
| 9. | <p>Click the PLAYER checkbox.</p>  |





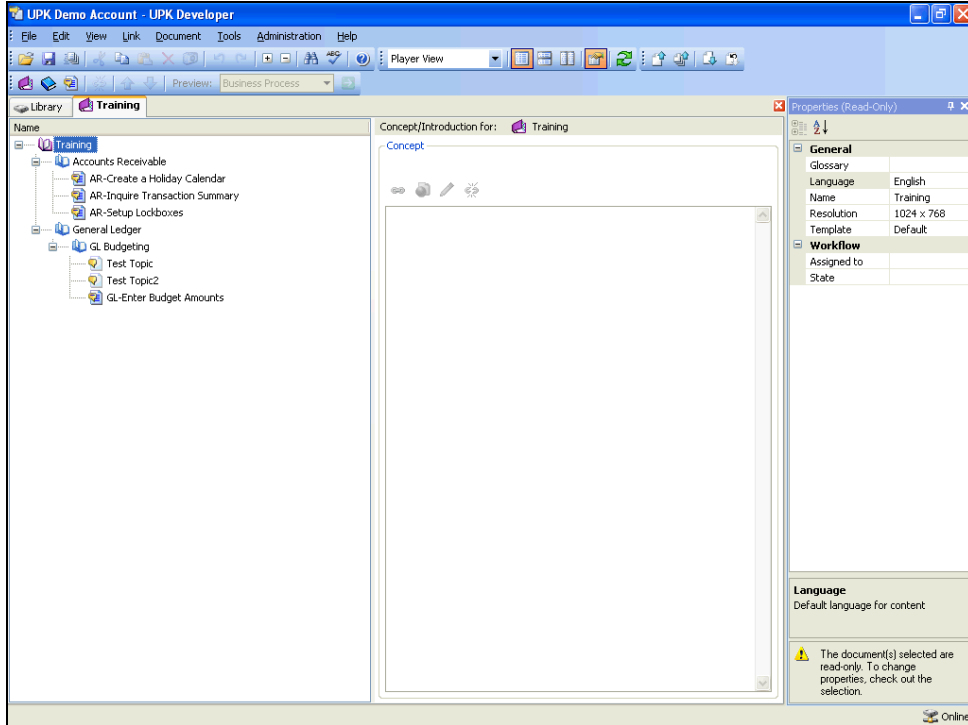
| Step | Action |
|------|---|
| 10. | <p>Optional. Change the default settings.</p> <p>Click on PUBLISH.</p> <div style="border: 1px solid black; padding: 2px; display: inline-block;">Publish</div> |
| 11. | UPK displays the publishing progress for the Player package. |


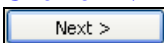
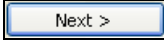

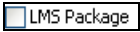


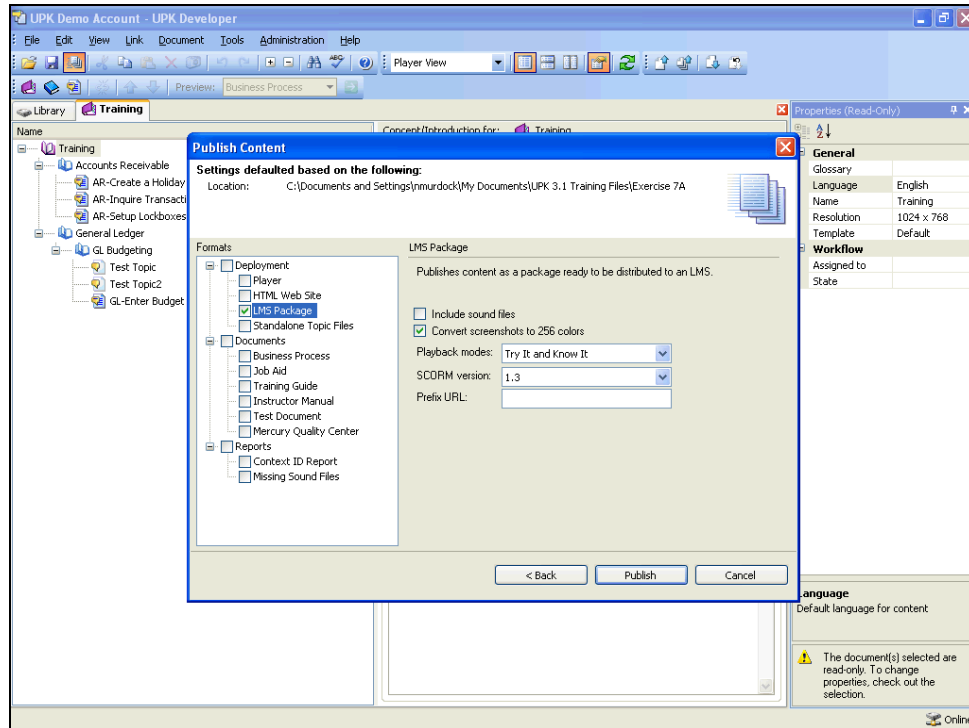
| Step | Action |
|------|---|
| 12. | <p>View the content in the Player format automatically.</p> <p>Click on FINISH.</p>  |





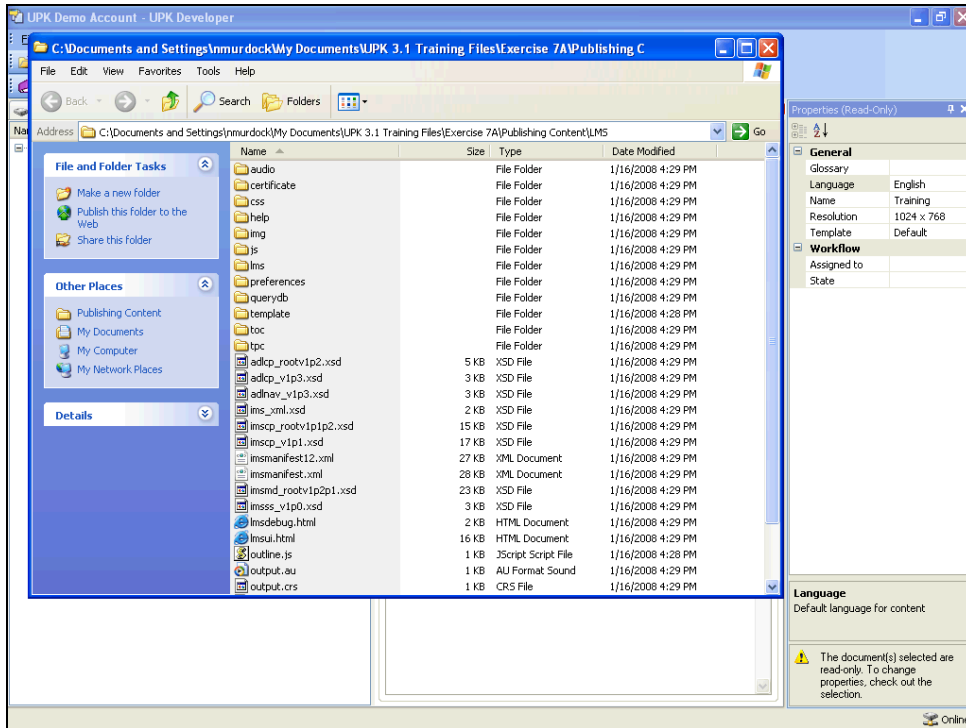
| Step | Action |
|------|---|
| 13. | <p>The Player Package displays in its own Browser window.</p> <p>Expand the outline.</p> <p>Click the [+] icons.</p>  |
| 14. | <p>Close the Player window.</p>  |




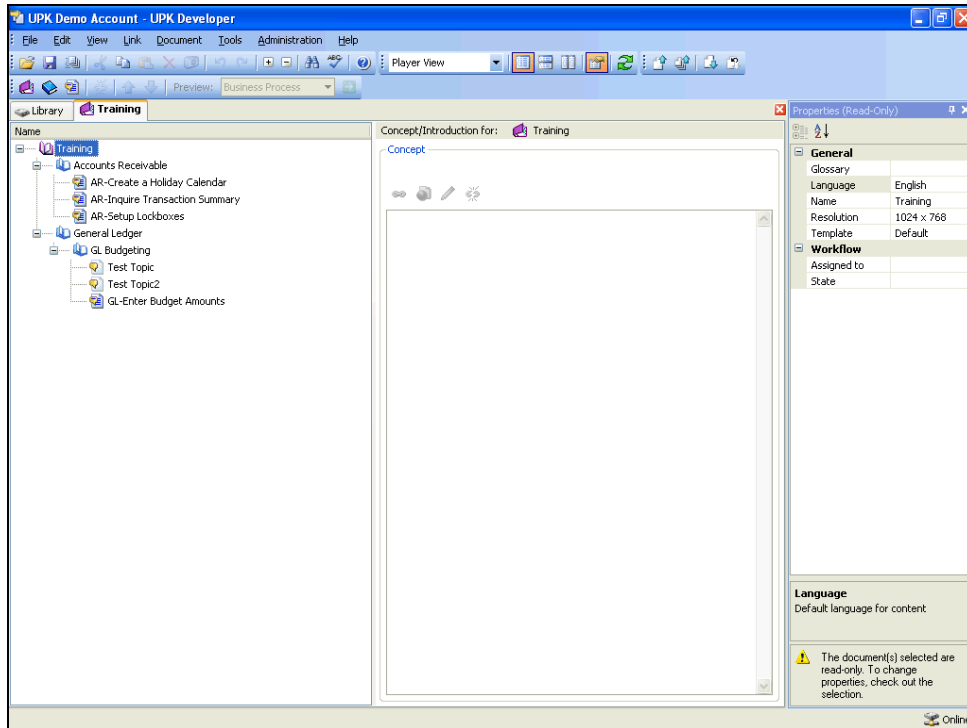
| Step | Action |
|------|---|
| 15. | <p>Publish content for a SCORM packaged used for a Learning Management System (LMS).</p> <p>Click on PUBLISH.</p>  |
| 16. | <p>Select the publishing destination or accept the default.</p> <p>Click on NEXT.</p>  |
| 17. | <p>Click on NEXT.</p>  |
| 18. | <p>De-select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


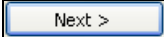
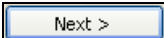




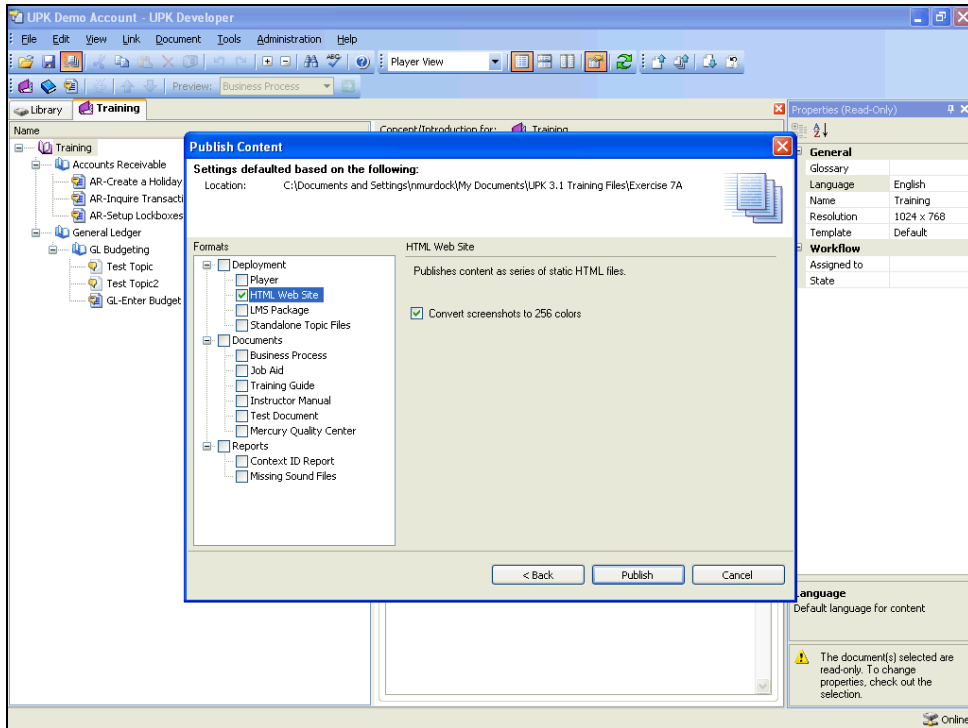
| Step | Action |
|------|---|
| 20. | <p>Optional. Change the publishing defaults.</p> <p>Click on PUBLISH.</p>  |
| 21. | <p>UPK displays the publishing progress for the LMS package.</p> |
| 22. | <p>Open the folder where the content was published.</p> <p>Click on FINISH.</p>  |





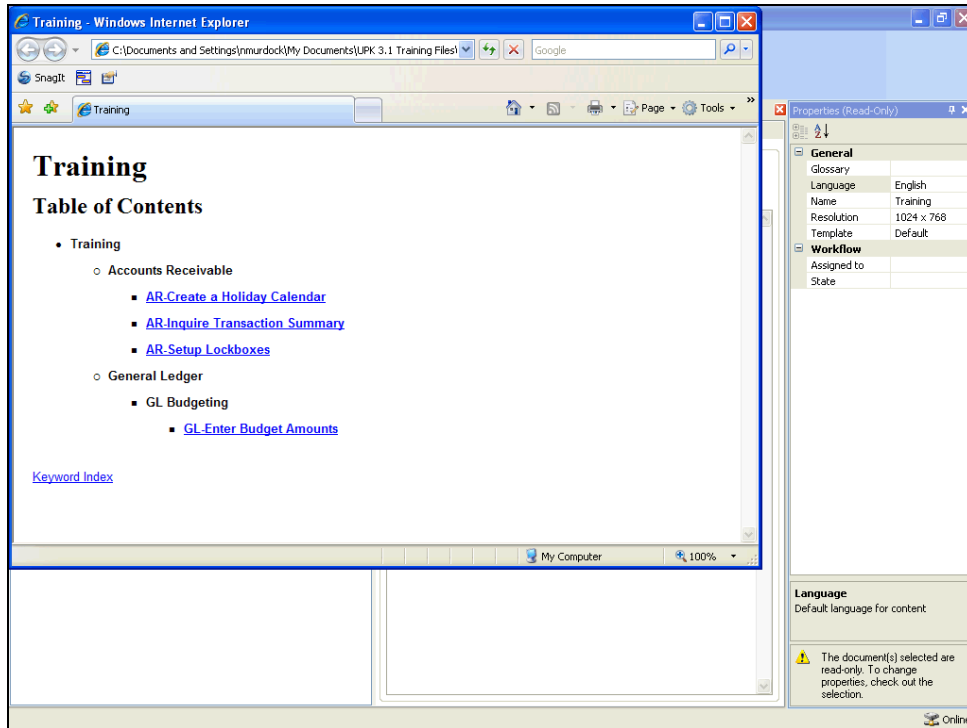
| Step | Action |
|------|--|
| 23. | <p>View the file structure for the LMS SCORM package.</p> <p>Close the window.</p>  |




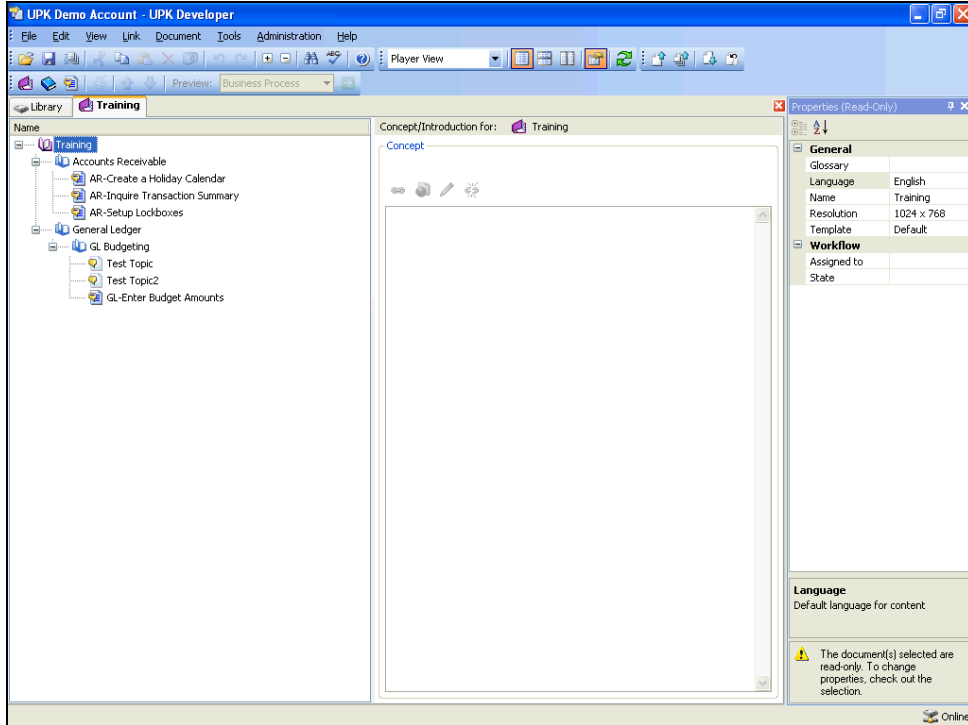
| Step | Action |
|------|--|
| 24. | <p>Publish content to a standalone HTML web site.</p> <p>Click on PUBLISH.</p>  |
| 25. | <p>Click on NEXT.</p>  |
| 26. | <p>Click on NEXT.</p>  |
| 27. | <p>De-select the LMS Package option.</p> <p>Click on LMS PACKAGE.</p>  |
| 28. | <p>Click on the HTML WEB SITE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


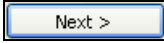
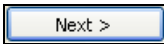

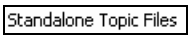


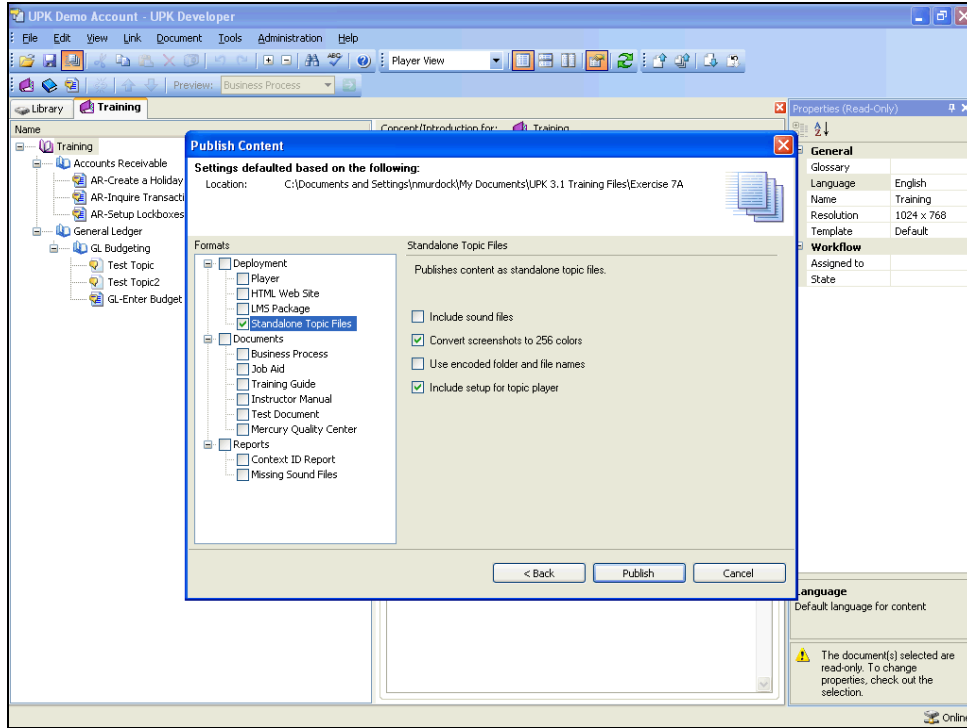
| Step | Action |
|------|--|
| 29. | <p>Click on PUBLISH.</p>  |
| 30. | <p>UPK displays the publishing progress for the standalone HTML Web Site.</p> |
| 31. | <p>Open the HTML Web Site.</p> <p>Click on FINISH.</p>  |



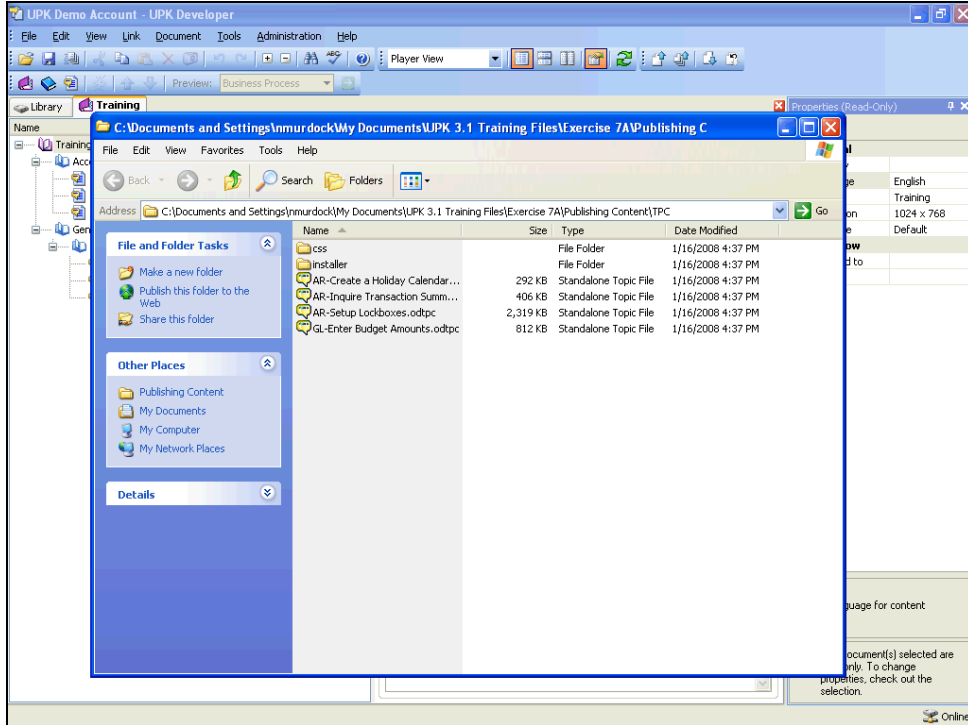
| Step | Action |
|------|---|
| 32. | <p>View the output by clicking on the links.</p> <p>Close the window.</p>  |




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



| Step | Action |
|------|--|
| 38. | <p>Click on PUBLISH.</p> <div style="border: 1px solid black; padding: 2px; width: fit-content; margin: 0 auto;">Publish</div> |
| 39. | <p>UPK displays the publishing progress for the standalone topic files.</p> |
| 40. | <p>Open the folder where the content was published.</p> <p>Click on FINISH.</p> <div style="border: 1px solid black; padding: 2px; width: fit-content; margin: 0 auto;">Finish</div> |



| Step | Action |
|------|---|
| 41. | <p>Close the window.</p>  |
| 42. | <p>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.</p> <p>End of Procedure.</p> |

Publish for Print

Procedure

Objective:

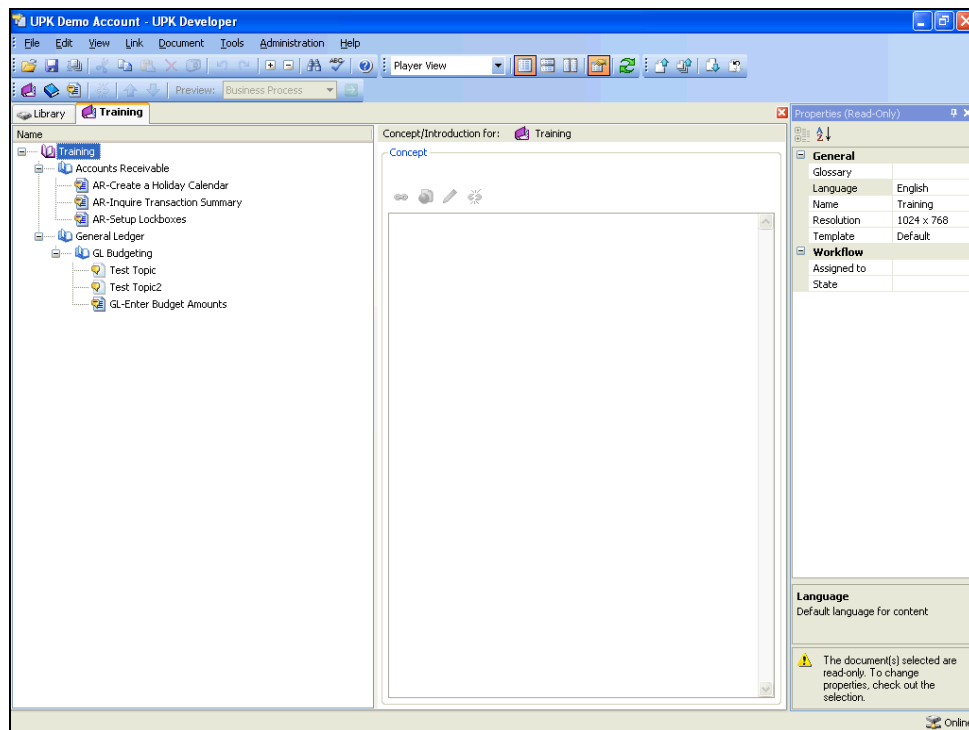
By the end of this exercise, you will be able to publish content the following document formats:


- A Business Process Document.
- A Job Aid.

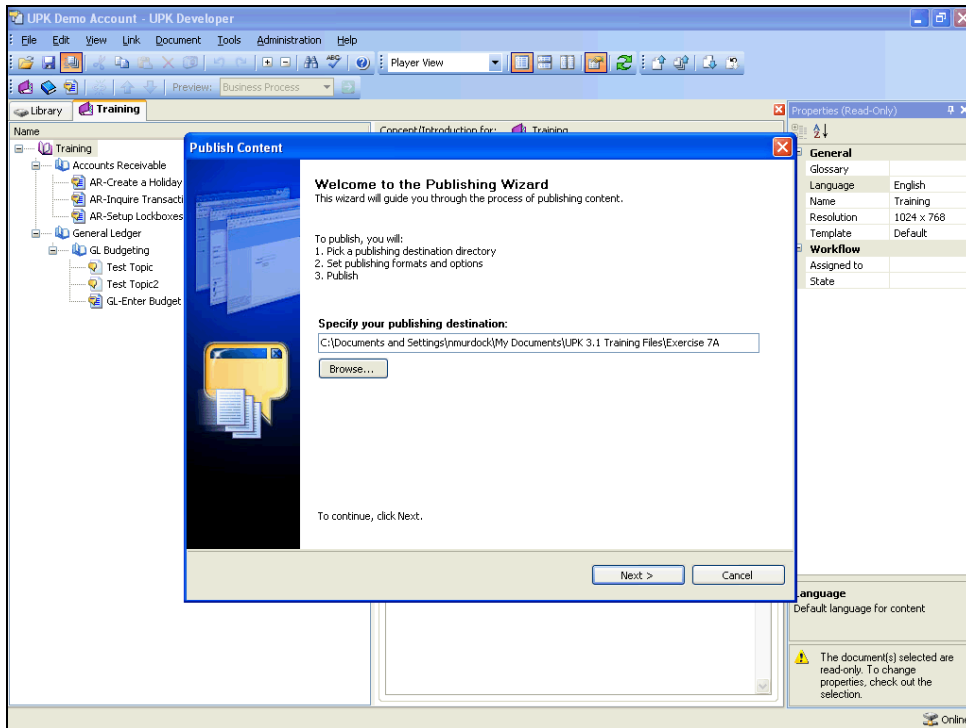
Prerequisites:

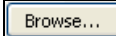
- Existing content is available to deploy.

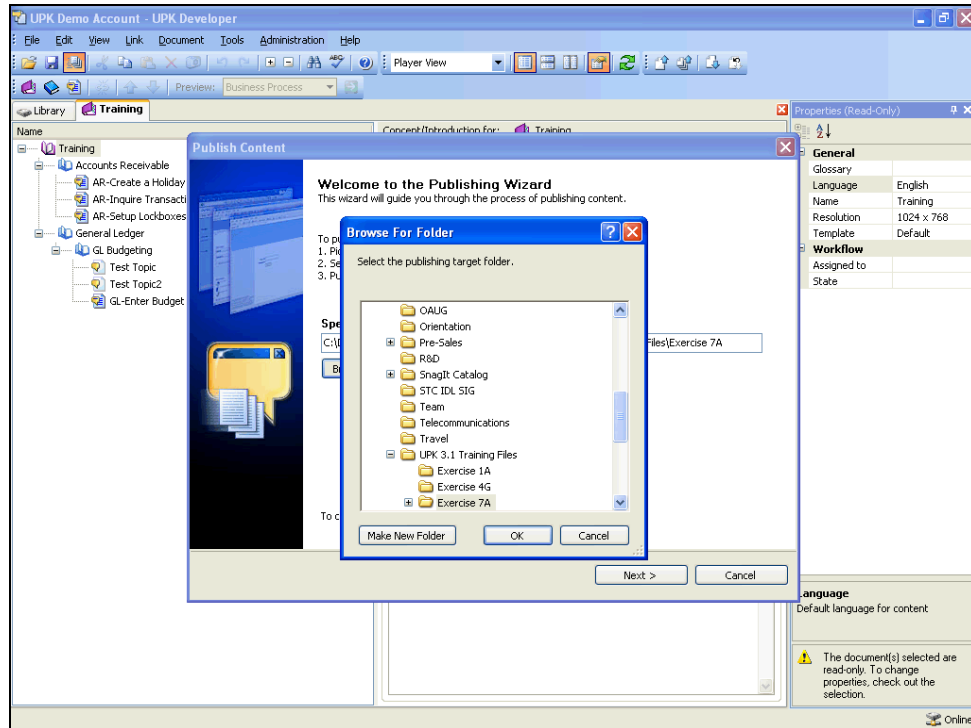
| Step | Action |
|------|--|
| 1. | Navigate to your UPK Training folder and open the Training module in the Outline Editor. |



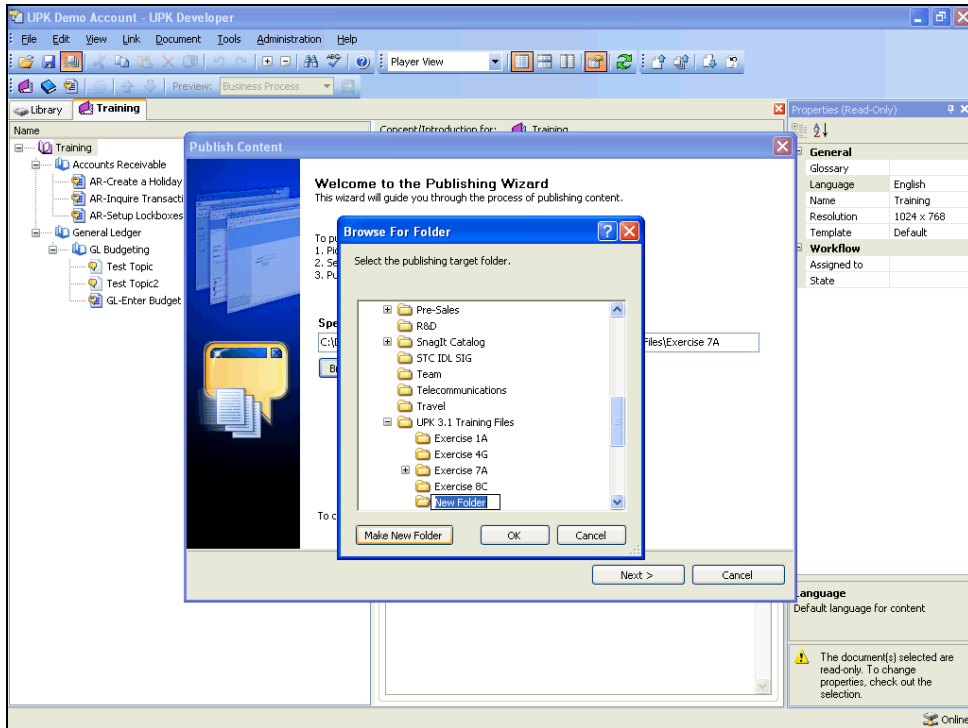
| Step | Action |
|------|--|
| 2. | <p>Publish content as a Business Process Document.</p> <p>Click on the PUBLISH icon.</p>  |

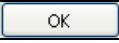
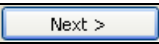
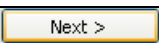


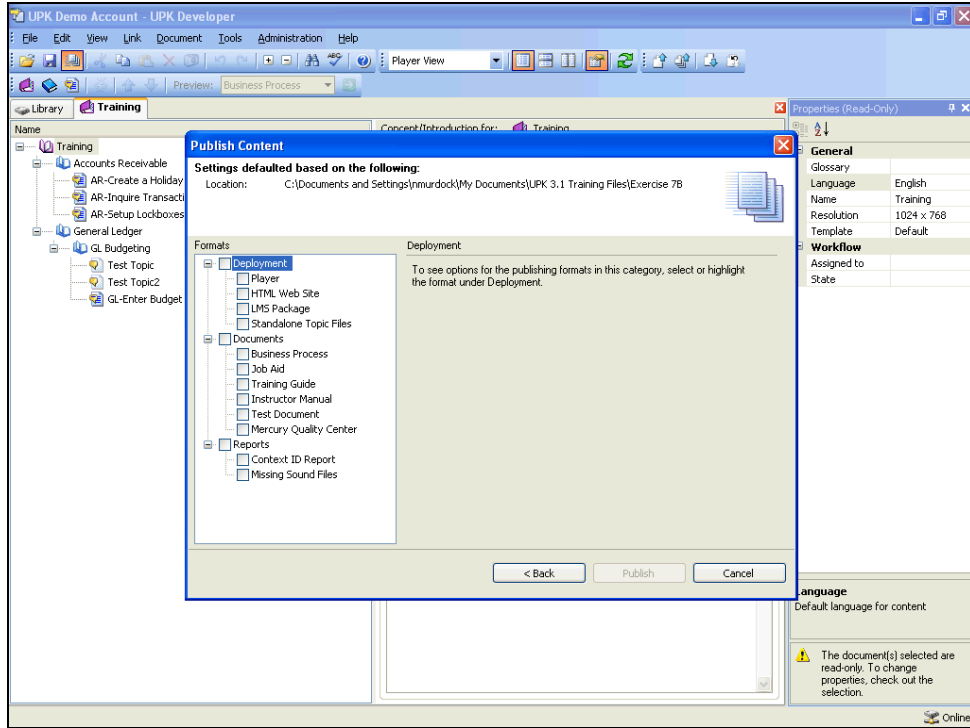
| Step | Action |
|------|---|
| 3. | <p>Choose a different publishing destination.</p> <p>Click on BROWSE.</p>  |



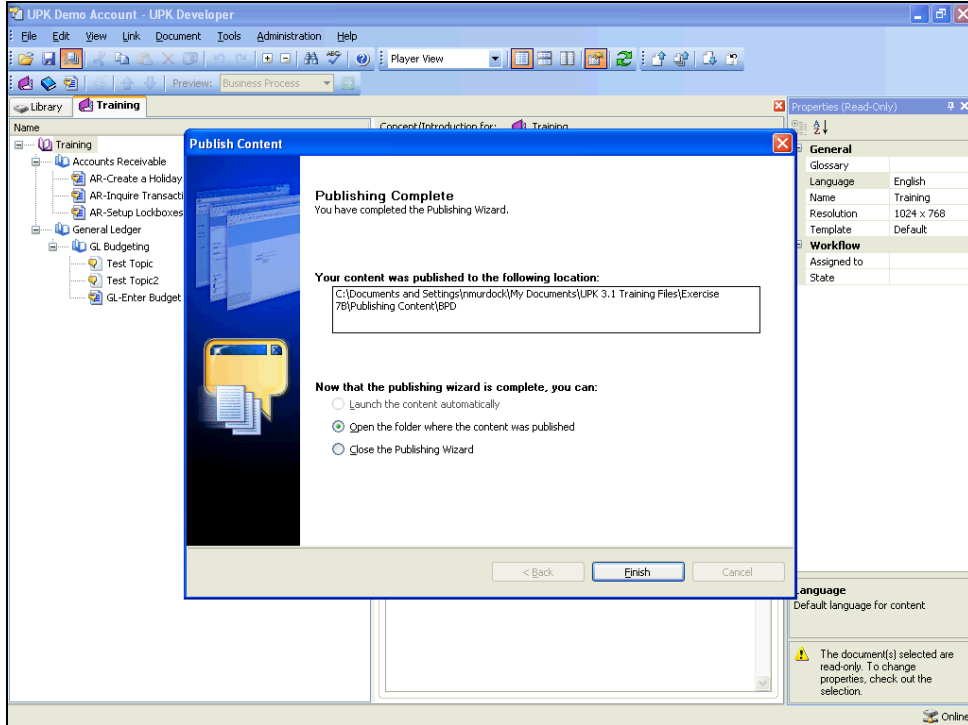
| Step | Action |
|------|---|
| 4. | <p style="color: blue; text-align: center;">Click on MAKE NEW FOLDER.</p> <div style="border: 1px solid black; padding: 2px; width: fit-content; margin: auto;"> Make New Folder </div> |





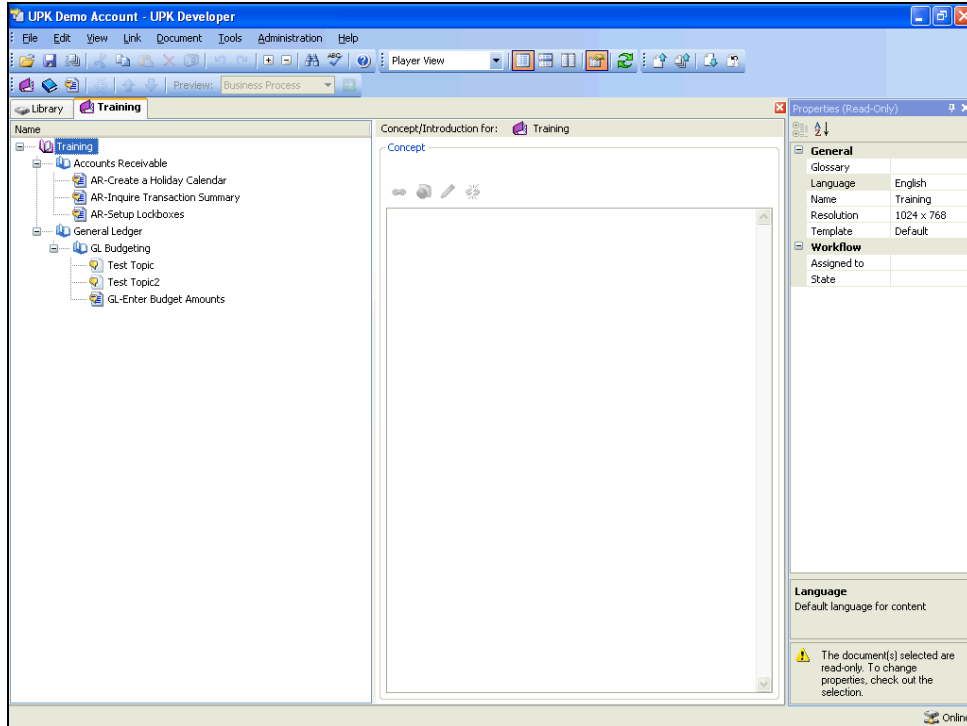
| Step | Action |
|------|--|
| 5. | Type Exercise 7B in the NEW FOLDER field. |
| 6. | Click on OK.  |
| 7. | Click on NEXT.  |
| 8. | Click on NEXT.  |


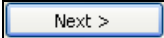
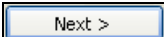



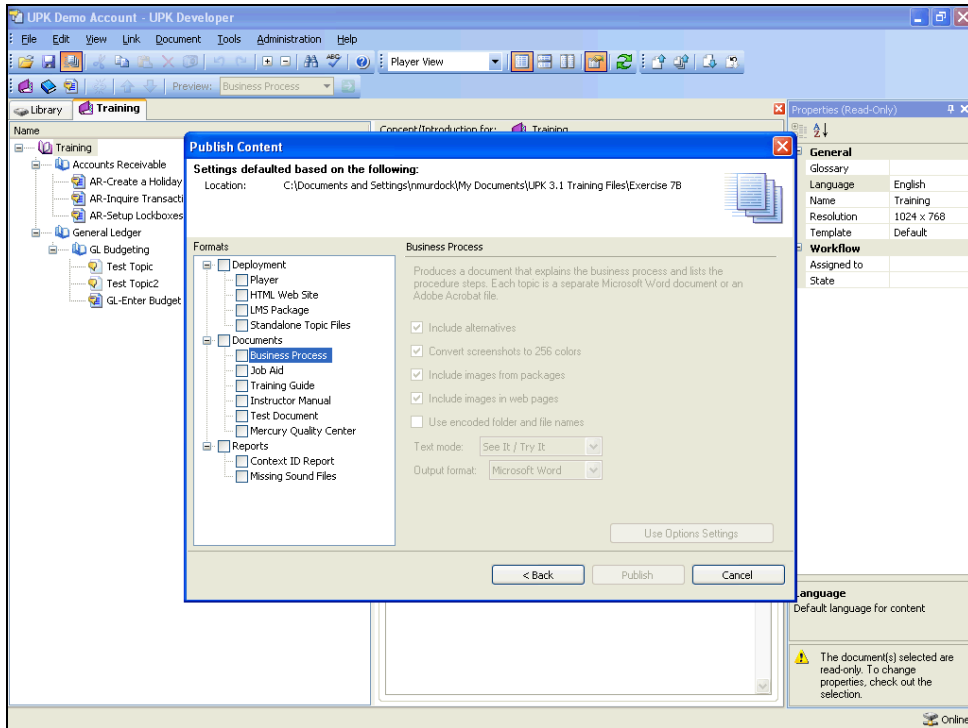
| Step | Action |
|------|---|
| 9. | <p>Click in the BUSINESS PROCESS checkbox.</p> <input type="checkbox"/> Business Process |
| 10. | <p>Click on PUBLISH.</p> <input type="button" value="Publish"/> |
| 11. | <p>UPK displays the publishing progress for the Business Process Document.</p> |







| Step | Action |
|------|---|
| 12. | <p>Open the folder where the content was published.</p> <p>Click on FINISH.</p>  |
| 13. | <p>Open the documents and review.</p> <p>Close the window.</p>  |



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



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