




UPK (User Productivity Kit)

Developer Training Manual

OTS PUBLICATION: UPK4 • REVISED 07-18-2007 • TRAINING@TOWSON.EDU • OFFICE OF TECHNOLOGY SERVICES

 =Shortcut  =Advice  =Caution

Defining the Developer

The developer allows you to create simulations, in-application support, and interactive documentation in a simulated environment and while working with your data in a live environment.

- Create an outline of the content and record it.
- Record the content as you build your outline.
- Edit steps after you record the content.
- View steps in the various Playback mode.

Setting the Stage

To set the stage, open the environment for which you want to record the content or edit any delivered content. For our training purposes, you will need to open the PeopleSoft 8.9 Dev environment. Your stage is now set!

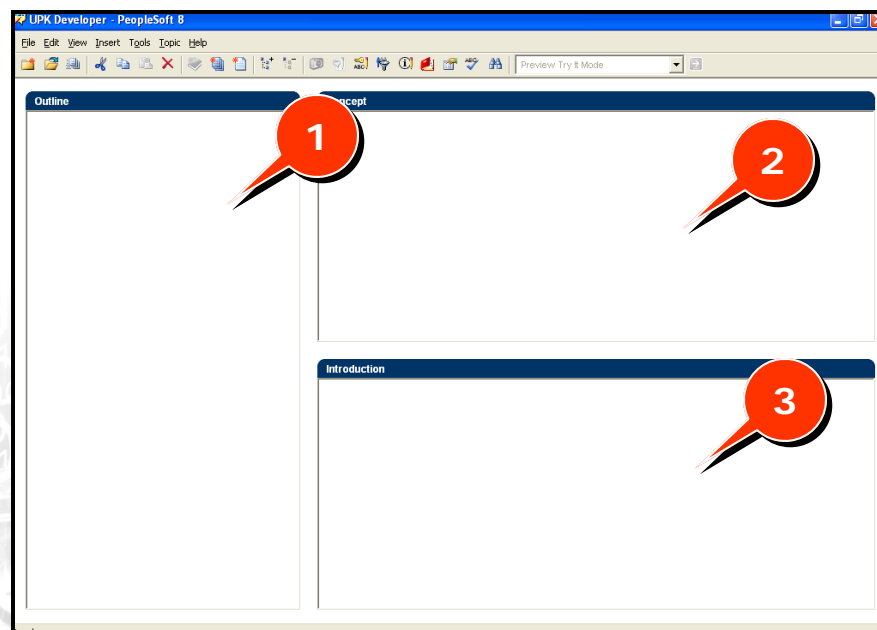
Opening the Developer

1. Launch the UPK Developer from the **Start > Programs > User Productivity Kit** menu or by double clicking on the **UPK Developer** shortcut icon that you can create on your desktop (Figure 1).
2. The Developer will open in the Outline Editor view displaying three panes.
3. The first pane, the **Outline** pane (Figure 2, 1) is located on the left-hand side. The Outline pane will contain a three level outline structure; modules, lessons and topics.
4. The upper right-hand pane is the **Conceptual** pane (Figure 2, 2). This pane provides conceptual or explanatory information about a module, lesson or topic.
5. The **Introduction** pane (Figure 2, 3), located in the lower right-hand, provides a short statement introducing the topic selected in the Outline pane.

Figure 1



Figure 2



The Introductory text comes from the Introductory frame which is the first frame created in the Developer and can be modified.

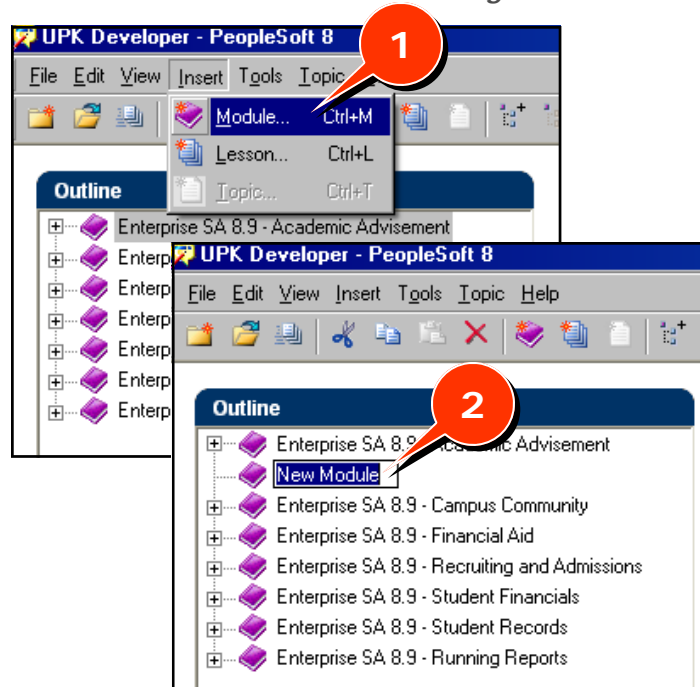
Understanding the Outline Structure

Insert a New Module

The first level displayed in the Outline pane is the **Module**. The module is the highest level in the structure and is represented by a purple book icon. The Module is the folder created within the title and must contain a unique name.

Figure 3

1. Select an existing module, if applicable.
2. Click **Insert > Module** (Figure 3, 1).
3. Type the name for the new module (Figure 3, 2).
4. Click the **ENTER** key on your keyboard.

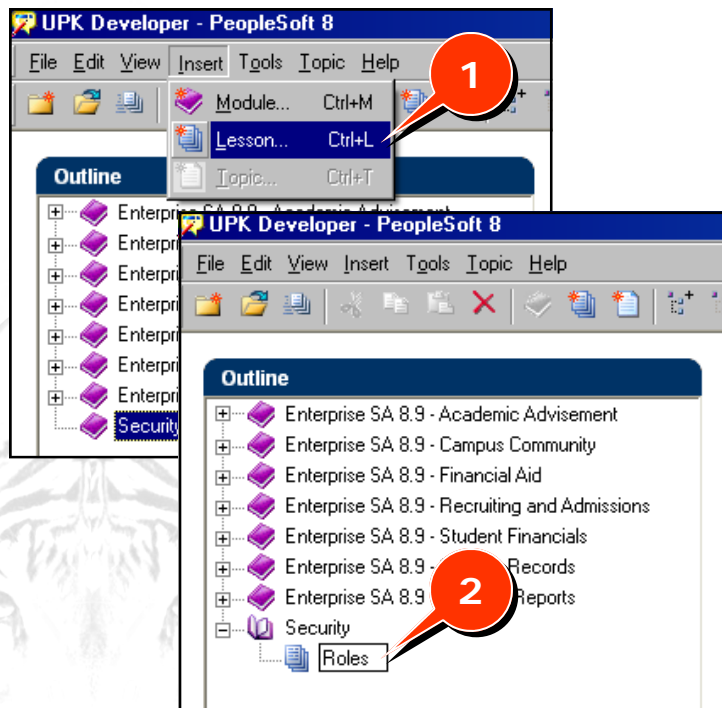


Insert a New Lesson

The second level in the hierarchy is the **Lesson**. The Lesson is represented by a stack of papers icon. Every module contains one or more Lessons.

Figure 4

1. Select the desired module or lesson.
2. Click **Insert > Lesson** (Figure 4, 1).
3. Type the name for the new Lesson (Figure 4, 2).
4. Click the **ENTER** key on your keyboard.



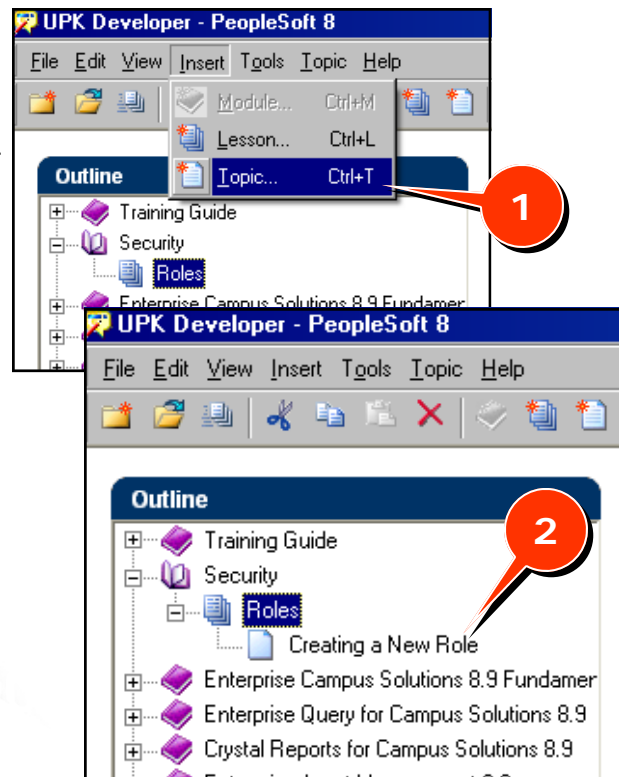
Insert a New Topic

You must select a lesson or a topic in the outline to insert a new topic. If a lesson is selected, a new topic is inserted as the first topic in the lesson. If an existing topic is selected, a new topic is inserted after the selected topic. You cannot insert a topic if a module is selected; the Topic command on the Insert menu will be unavailable. The topic name is generally a brief statement describing the objective of the task covered in the topic.

Each module in a title has its own database. Each topic name is an entry in the database to which information is linked; therefore, topic names must be unique within a module for the links to work correctly.

Figure 5

1. Select a lesson or topic.
2. Click **Insert Topic** (Figure 5, 1).
3. Type the name for the lesson (Figure 5, 2).
4. Click the **ENTER** key on your keyboard.



Rename, Move, Copy and Delete Outline Items

- To **Rename** an Outline item select the item and choose **Edit > Rename**.
- To **Move** an Outline items you can use either drag and drop the item or use the Cut and Paste commands. When you move an outline item, all its subordinate items move as well. For example, if you move a lesson, all topics in that lesson move with it.
- If you **Copy** a topic to another location within the same module, the original and the copy are linked together and changes in any occurrence of that topic will be reflected in all other occurrences of the topic automatically. If you copy a lesson or topic to another module, the Developer creates a separate copy and places it in the new module. The original and the copy are not linked across modules.

- You cannot copy modules since you cannot have two modules with the same name within a title.
- To Delete an Outline item, select it and choose **Edit > Delete**. You may decide to delete an outline item you no longer need. You can delete items whether they have content or are empty. If you delete items that contain content, the content is deleted as well. When you delete an outline item, anything below that item in the hierarchy is also deleted. Therefore, when you delete a lesson, all topics within that lesson are also deleted. **When you attempt to delete an outline item, the Developer prompts you to verify the deletion.** If you delete a topic that is linked to another topic in the module, the Developer displays a second message, asking you whether you want to delete the other linked topic(s) as well.



You cannot undo a deletion.

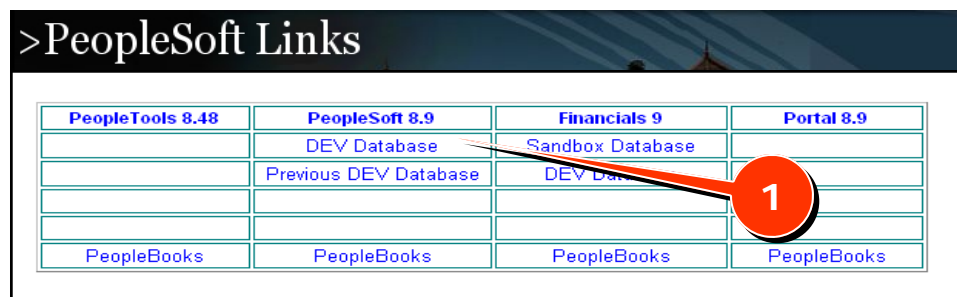
Recording the Topic

The **Recorder** allows you to capture each step of the process with screen captures as you perform the task within the application.

To record a **Topic**

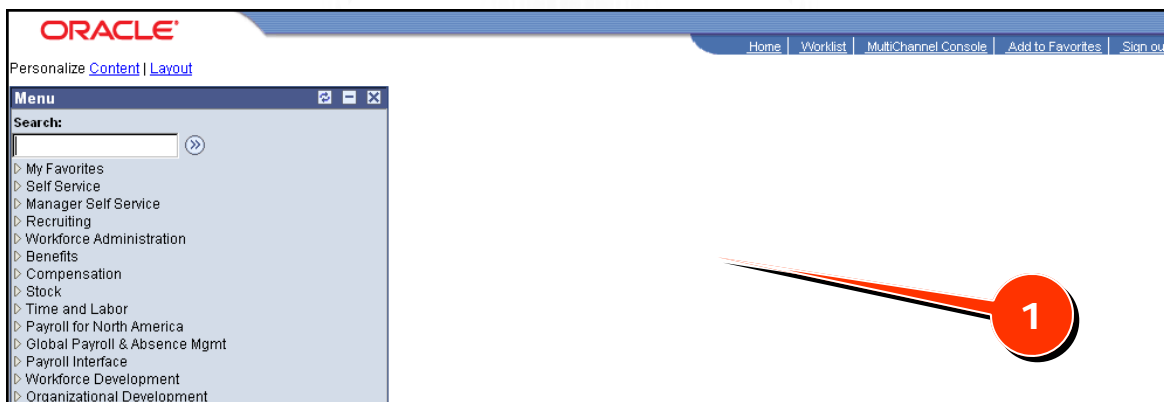
1. To set your stage, navigate to the **PeopleSoft Dev Database** and login (Figure 6, 1).

Figure 6



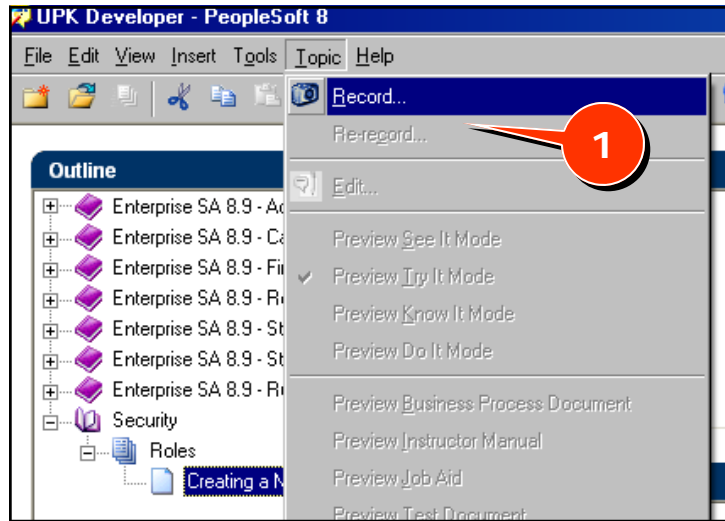
The PeopleSoft application will open setting the stage for your UPK recording. (Figure 7, 1)

Figure 7



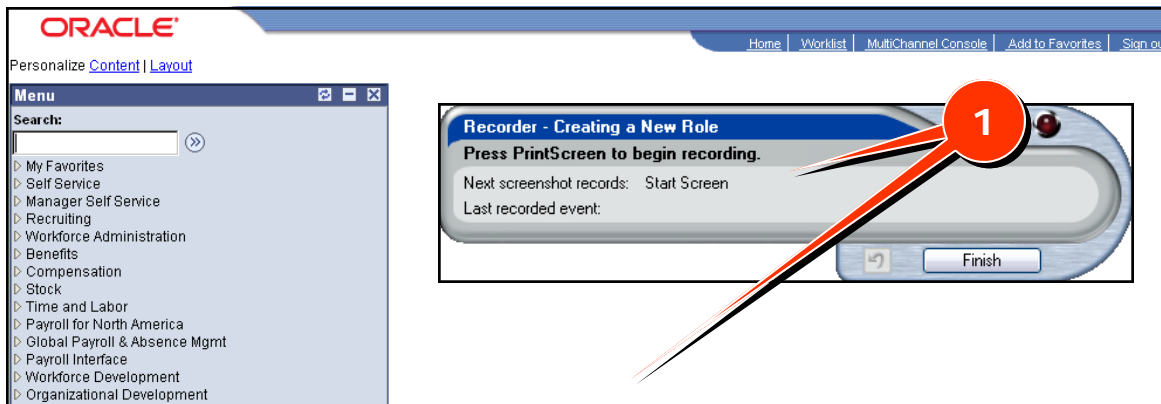
2. In the UPK Developer, Click **Topic > Record** (Figure 8, 1).

Figure 8



! The Recorder will be displayed on top of the PeopleSoft application (Figure 9, 1).

Figure 9

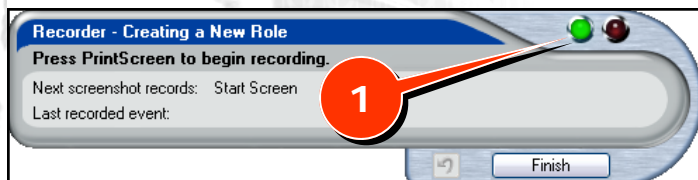


! The Recorder allows you to take pictures of each step you perform in a task with a screen capture. This is completed by taking a series of pictures of the way the screen looks after each step in a task.

3. To **Record a Topic**, press the **PRINTSCREEN** key on you keyboard to capture a screen shot for every step in the procedure.

Figure 10

! The status indicator light on the recorder must be **GREEN** to begin recording (Figure 10, 1).



Each screen image you capture contains an action, such as a mouse click or keyboard stroke. The combination screen capture and action is called a **Frame** (Figure 11).

4. If an action is used on the screen, TWO PRINTSCREENS will be needed. The first to capture the screen; the second to capture the action.

Quick Step Guide to Recording a Topic


1. Click on the **Topic** for which you want to record.
2. Click **Topic > Record**.
3. Press **PRINTSCREEN** to record the first frame from your PeopleSoft stage.
4. Perform the first step in your procedure.
5. Press **PRINTSCREEN**.
6. Perform the next step in your procedure > Press **PRINTSCREEN**.
7. Repeat steps 4 through 5 as needed to complete all the steps for your procedure.
8. Click **Finish** after you have recorded your last step.
9. Click **Exit to Close**

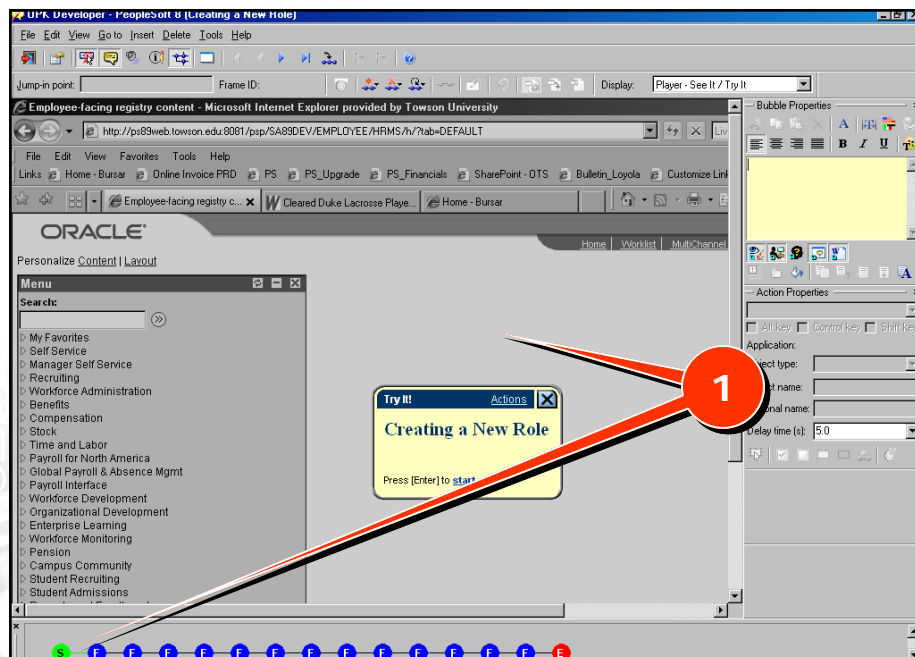
Opening the Topic Editor

You can open the Topic Editor at any time to modify the frames, settings or bubble text for the frames. (Figure 11, 1)




1. Select the **Topic** you want to edit from the UPK Developer Outline.
2. Click **Edit Topic**.

Figure 11

 The Topic Editor window will open and display the screenshot for the current frame.



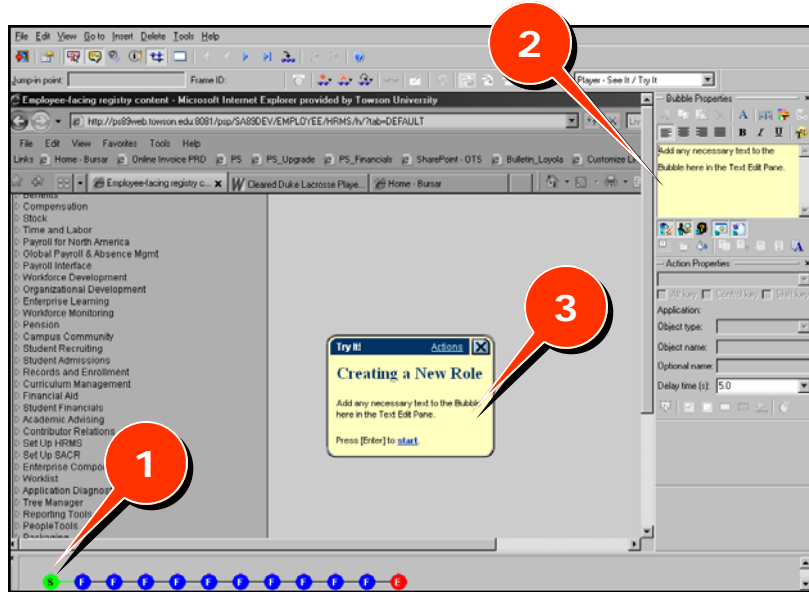
The **Frame Structure** window contains a circle for every frame of the topic as follows: (Figure 12, 1).


ICON	FRAME TYPE
	Introduction Frame
	Frame
	End Frame

Adding Text to the Bubble

1. Navigate to the desired frame by clicking on the **Frame Icon** (Figure 12, 1).
2. In the **Text Edit Pane** begin typing any necessary text (Figure 12, 2).
3. The newly entered text will be displayed in the bubble on the **Frame** (Figure 12, 3).

Figure 12

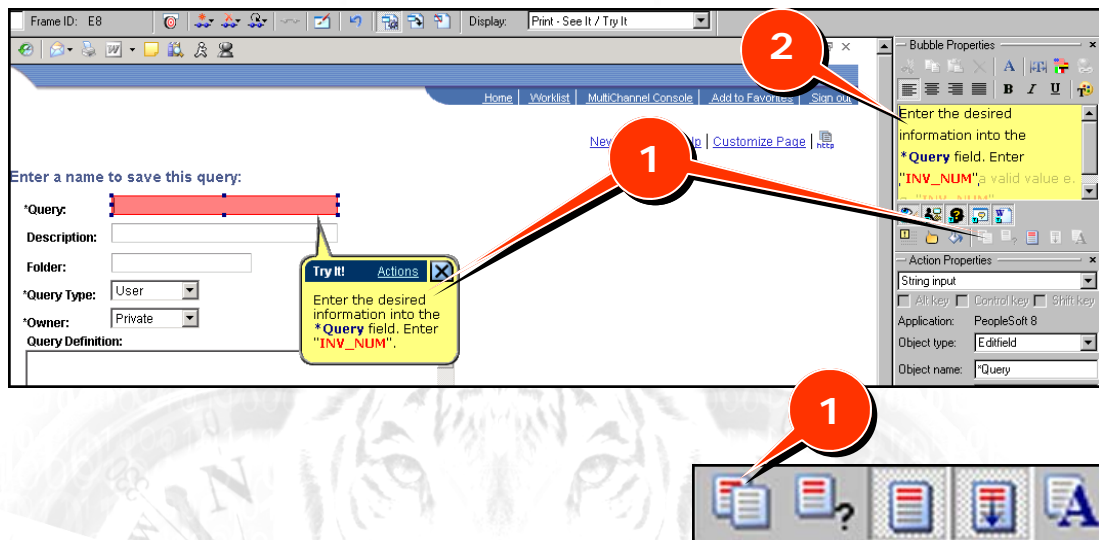


 The **Introduction Frame** displays a green dot only because it is the selected frame (Figure 12, 1).

Editing Text in the Bubble

1. To edit existing text in the Bubble (Figure 12A, 1), click the **Insert template text as user text** icon (Figure 12A, 1).
2. Enter new text in the **Text Edit Pane** (Figure 12A, 2).

Figure 12A



Repositioning Text in the Bubble

1. To reposition added text in the Bubble (Figure 12B, 1), **Click the Show custom text first icon** (Figure 12B, 2).

Figure 12B, 1

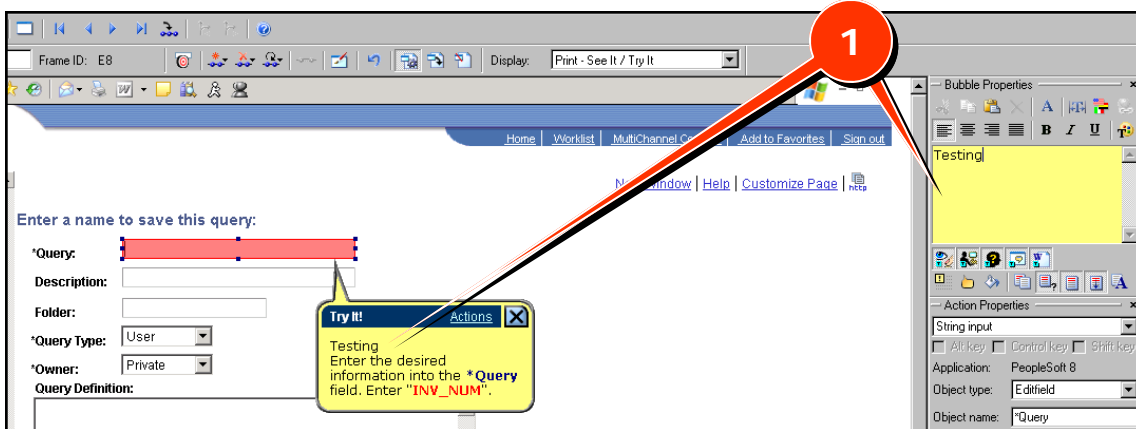
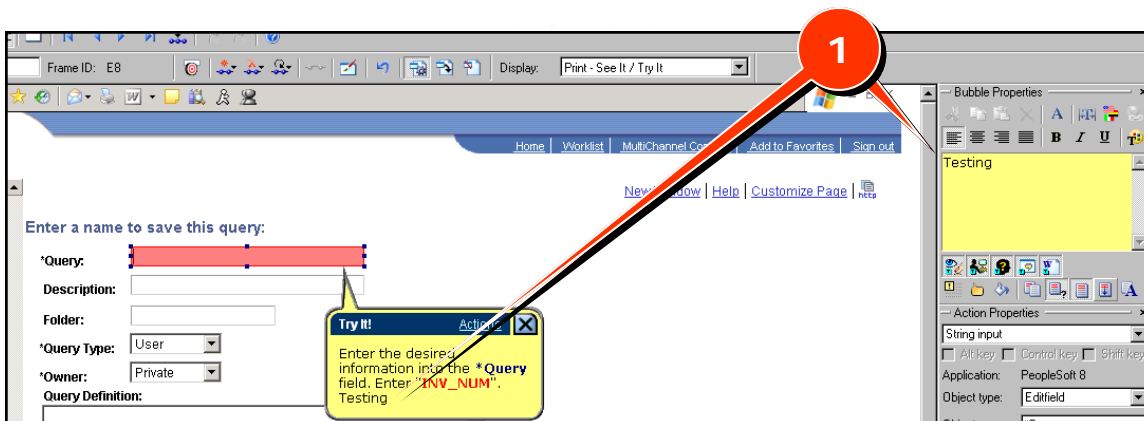


Figure 12B, 2



2. **Click the Show custom text first icon** a second time to reposition the text to the bottom of the Bubble (Figure 12C, 1).

Figure 12C



Repositioning the Bubble Pointer

1. To reposition the Bubble Pointer (Figure 12D, 1), **Click the Pointer Position Icon** (Figure 12D, 2)
2. **Click** the position of the Bubble Pointer. (Figure 12D, 2)
3. Your Bubble Position Pointer has now be repositioned. (Figure 12E, 1)

Figure 12D

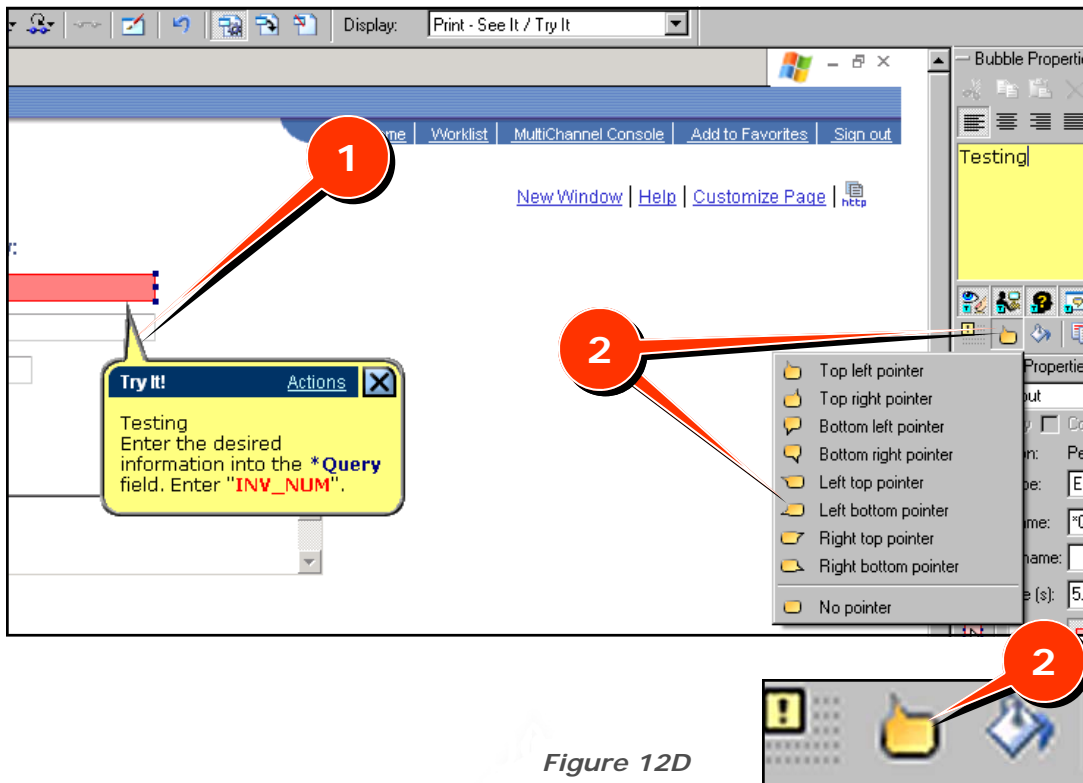
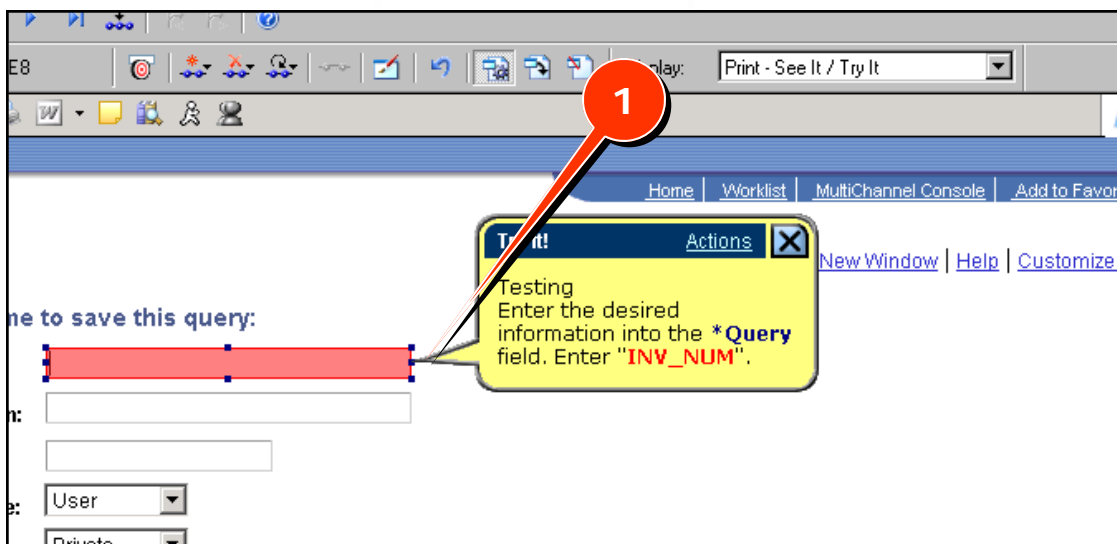


Figure 12D

Figure 12E



Previewing the Topic

Once you have recorded your Topic, you can now preview your Topic in several modes by clicking on the drop down arrow in the Preview Mode Field and selecting the desired Mode: (Figure 13, 1)

1. **See It Mode** - No interaction is required from the user to preview the recorded task. Press the enter key to view at your pace or allow the demonstration to play without any user interaction. To exit the See It Mode, press the **ESC** key or click on the **X**.
2. **Try It Mode** - Allows the user to preview the topic using the Enter key to advance to the next step. To exit the Try It Mode, press the **ESC** key or click on the **X**.
3. **Do It Mode** - This playback mode is opened in the target application (PeopleSoft) allowing the user to complete the task, step by step. To exit the Try It Mode, press the **ESC** key or click on the **X**.
4. **Know It Mode** - Is an assessment-type playback mode in which users are instructed to complete a particular task. Users do not receive step-by-step instructions for completing a task. Instead, they complete the steps on their own in a simulated environment, and they are scored on how accurately they complete them.

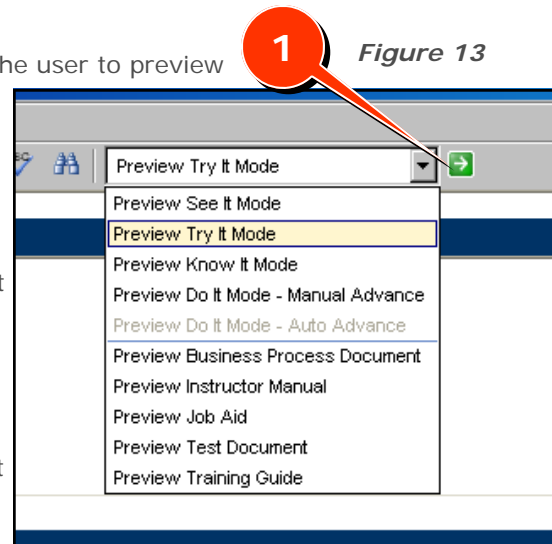


Figure 13

Inserting Frames

Before inserting a frame, you will need to set your stage to match the correct step in the task where you want to insert the frame. You insert a new frame after the current frame.

1. Set the PeopleSoft stage to the correct position to begin recording the task.
2. Switch back to the Developer
3. **Double click** on the Topic. The Topic will open in the Topic Editor.
4. Using the Frame Icons, select the frame after which you want to insert a frame. (Figure 14, 1)

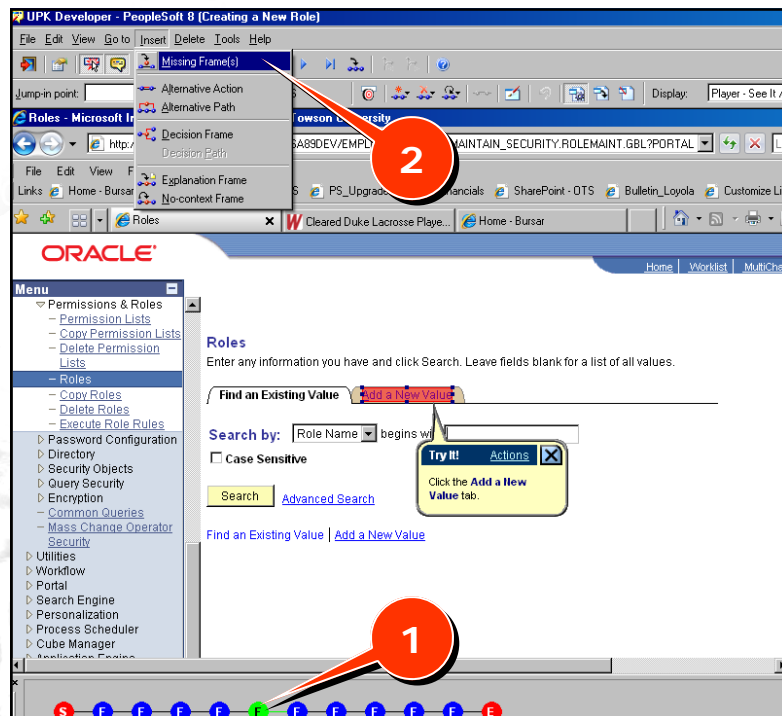


Figure 14

5. Click **Insert > Missing Frame** (Figure 14, 2).
6. The Recorder will open allowing you to record the needed screenshot.
7. Press **PRINTSCREEN** to record the screen shot.
8. Perform the necessary action and Press **PRINTSCREEN**.
9. Repeat steps 7 and 8 as needed.
10. Click **Finish** to exit the recording session

Deleting Frames

1. **Navigate** to the frame you want to delete using the Frame Icons (Figure 15, 1).
2. Click **Delete > Frame** (Figure 15, 2).
3. Click **Yes**.

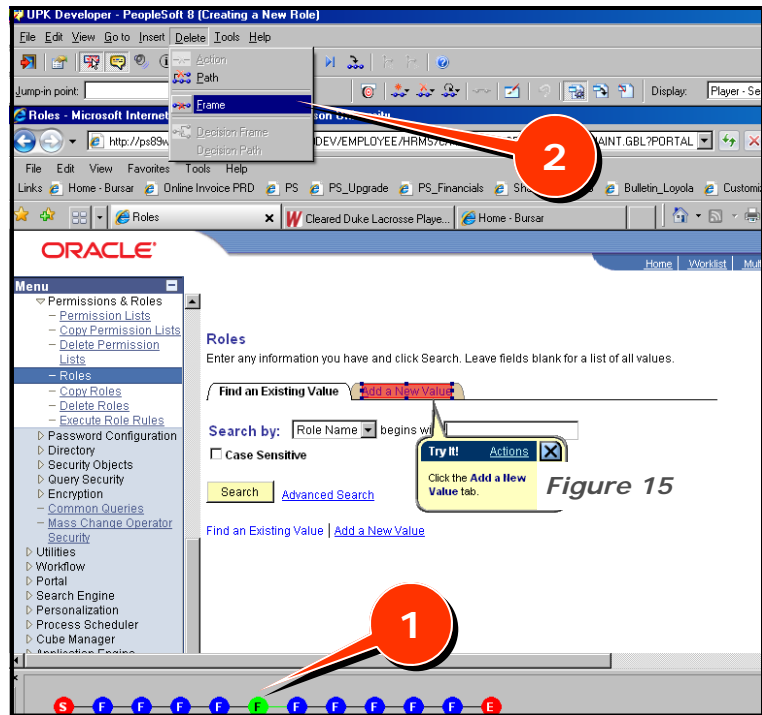


Figure 15