Training

Using KFS UPK Online Tutorials

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REVISION LOG

This document is under version control. The current version can be found in the footer of the document.

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<th>Version</th>
<th>Date</th>
<th>Description</th>
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<tr>
<td>1.0</td>
<td>12/1/2013</td>
<td>Document Creation</td>
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<tr>
<td>1.1</td>
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<td>Updated screen shots</td>
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Using KFS UPK Online Tutorials

Procedure

The User Productivity Kit, also known as UPK, is a training tool that allows campus users to learn how to use the Kuali Financial System. UPK tutorials are available 24/7 and allow you to customize your learning by providing easy to use online tutorials.

All of the information covered in KFS classes are also covered in the online the tutorials. The online tutorials can be useful before or after training in case you want to get a head start on training or need a quick refresher.

Note: While these UPK tutorials are helpful training resources these should not be used as a replacement for instructor-led training. UPK tutorials were designed to be used as supplements to KFS training. We encourage everyone that uses KFS to attend instructor-led training.

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<td>1.</td>
<td>You will need to access the online tutorials using Firefox or Safari. Firefox is the recommended browser for the Kuali Financial System. To access the KFS UPK Online tutorials please visit kualifinancial.umd.edu. Note: The UPK tutorials have been optimized to run on Android and Mac handheld devices.</td>
</tr>
<tr>
<td>2.</td>
<td>Click the KFS UPK Online Tutorials link.</td>
</tr>
</tbody>
</table>
3. The CAS login screen will ask you for two pieces of information your Directory ID and Password.

In this example, you will be signing into KFS using a Training ID and Password.

Enter "kfstrain01" in the Directory ID: field.

4. Enter "tstpwd01" in the Password: field.

5. If you have forgotten your Directory ID, you can click on the Identification Verification page or Password Change page if you have forgotten your password.
### Step 6
**Action**
Click the **LOGIN** button.

### Step 7
**Action**
The **UPK Player** will open in your browser.

**Note:** **KFS UPK Online Tutorials** are outlined by Modules and Topics.
### Step 8

If you have a pop-up blocker installed on your computer, it will prevent some windows or tabs from opening in **UPK**.

**Note:** Please contact your local IT department for directions on disabling your pop-up blockers. You may also try using a preferred search engine to search for directions on disabling your pop-up blockers.

### Step 9

Click the "+" sign to expand the Module.

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<td>10.</td>
<td>You may view any tutorial by clicking on the name of the tutorial you would like to view. Click the <strong>KFS Online Training Prerequisites</strong> module.</td>
</tr>
<tr>
<td>11.</td>
<td>Once you click the <strong>KFS Online Training Prerequisite</strong> the folder will open to display the 13 topics and one training assessment that need to be taken prior to class.</td>
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| 12.  | The **UPK Player** has a built-in search engine. This allows you to search for words that are found within the different tutorials not just the topics names.  
**Note**: The Search function in the Outline pane is only available if the Player was launched from a Player package or from an in-application help link.  
Enter "**Basic Navigation**" in the field. |
| 13.  | Click the **search** magnifying glass. |
| 14.  | Any topics that contain the word(s) entered into the search field are now displayed. |
Step | Action
--- | ---
15. | Click the [X] to clear the search results as well as the search text you entered and return to the outline.

Click on the "[X]" field.
### Using KFS UPK Online Tutorials

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<td>16.</td>
<td>To collapse a <strong>Module</strong>, click the &quot;-&quot; sign.</td>
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</table>
| 17.  | A word that is **highlighted** and **underlined** in a tutorial means you can drill down and find out more information about that term or link.  
**Note:** The UPK tutorials contain links to workflow documentation, dictionary terms, and links to a variety of useful webpages.  
Click the **Kuali** link. |

![Image of Kuali glossary window](image.png)

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<td>18.</td>
<td>In this example, you clicked on the highlighted and underlined word <strong>Kuali</strong>. This displays the <strong>Glossary</strong> window with the definition of the term you clicked on.</td>
</tr>
<tr>
<td>19.</td>
<td>Click the <strong>Close</strong> button.</td>
</tr>
</tbody>
</table>
Step | Action
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20. | The **UPK Player** has a central area from which you can view the selected tutorial in three different modes: **See It!**, **Try It!**, and **Do It!**.
21. | The **See It! Mode** - automatically takes the user through the topic showing bubble explanations of the actions.
**Note**: The **See It! Mode** in **UPK** will automatically advance the slides for you.
22. | The **Try It! Mode** - allows the user to work through a simulation of the software with instructions and detailed information at each step.
**Note**: The **Try It! Mode** in **UPK** provides users with a more hands-on experience.
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<td>23.</td>
<td>The Do It! Mode: allows for a popup window to open on top of the application and helps walk you through the process step-by-step.</td>
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</table>

**Note:** The Do It! Mode in UPK is very useful if you want a little extra guidance as you are working through the system.
### Step 24 Action
The Print It! function allows you to print useful Job Aids with step-by-step directions.

**Note:** Job Aids do not include screenshots.

### Step 25 Action
Now, you will access the KFS Basic Navigation Overview tutorial in Try It Mode.

Click the “Try It” button.

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### Step 26 Action
Click the “Start” link to begin the tutorial.

### Step 27 Action
Click the “Actions” link within the context bubble.
28. A few options are displayed. These options are controlled based on the mode you have selected. The most common options found in the UPK Player are listed below.

- **Next Step**: Will advance the tutorial for you (You may also press the [Enter] button on your keyboard).

- **Previous Step**: Returns to the previous step.

- **Resume**: Closes the Action Menu and resumes the topic playback (This option is available in the See It! Mode).

- **Print It**: Displays another window or tab with the steps that are contained in the tutorial. This mode allows you to print without screen shots.

- **Help**: Displays the Player help function.

- **Close Topic**: Closes the topic in the current play mode and returns to the topic launch page.

29. To begin the tutorial, click the “start” link.
### Step 30

Click the **Actions** button and select the close topic link to return to the topic launch page.

Click the “**close topic**” link.
### Step 31

**Action**

Click the *Actions* button and select the close topic link to return to the topic launch page.

Click the “**close topic**” link.

### Step 32

**Action**

You have successfully completed the tutorial on Using KFS UPK Online Tutorials.

**End of Procedure**