



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.

Version	Date	Description
1.0	12/1/2013	Document Creation
1.1	3/21/2014	Updated screen shots



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.

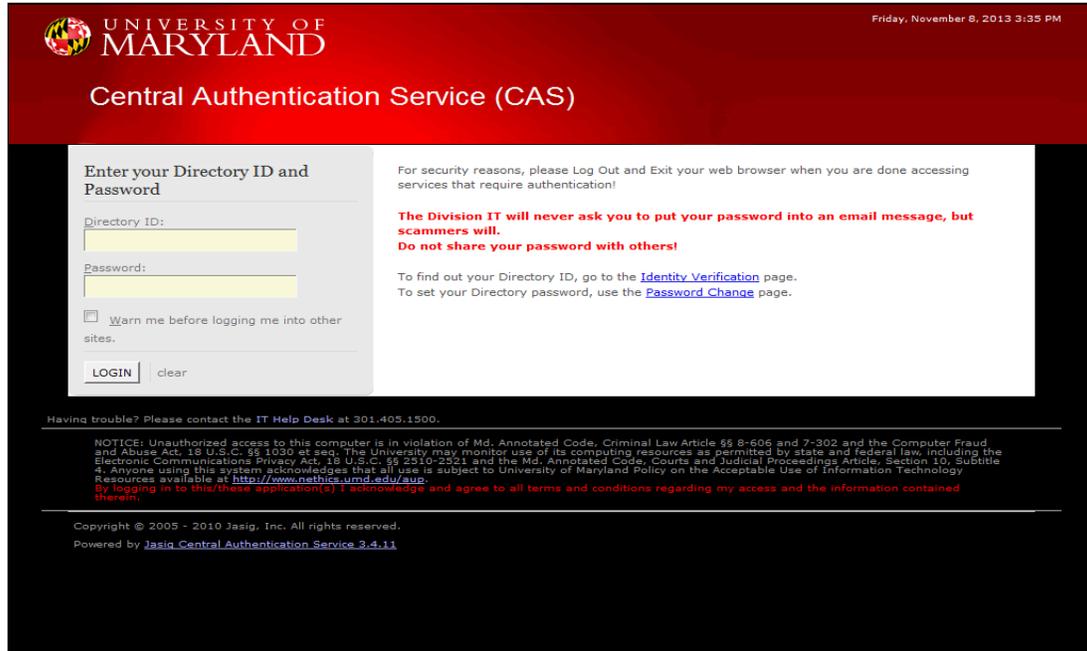
All of the information covered in **KFS** classes are also covered in the online the tutorials. The online tutorials can be useful before or after training in case you want to get a head start on training or need a quick refresher.

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.

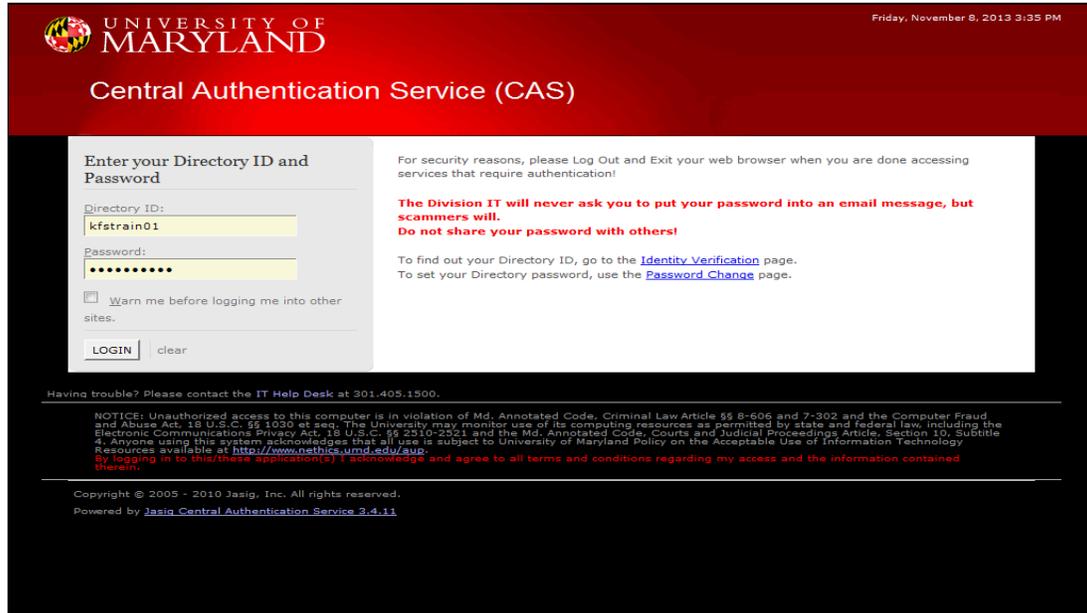
Step	Action
1.	<p>You will need to access the online tutorials using Firefox or Safari. Firefox is the recommended browser for the Kuali Financial System.</p> <p>To access the KFS UPK Online tutorials please visit kualifinancial.umd.edu.</p> <p>Note: The UPK tutorials have been optimized to run on Android and Mac handheld devices.</p>

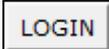


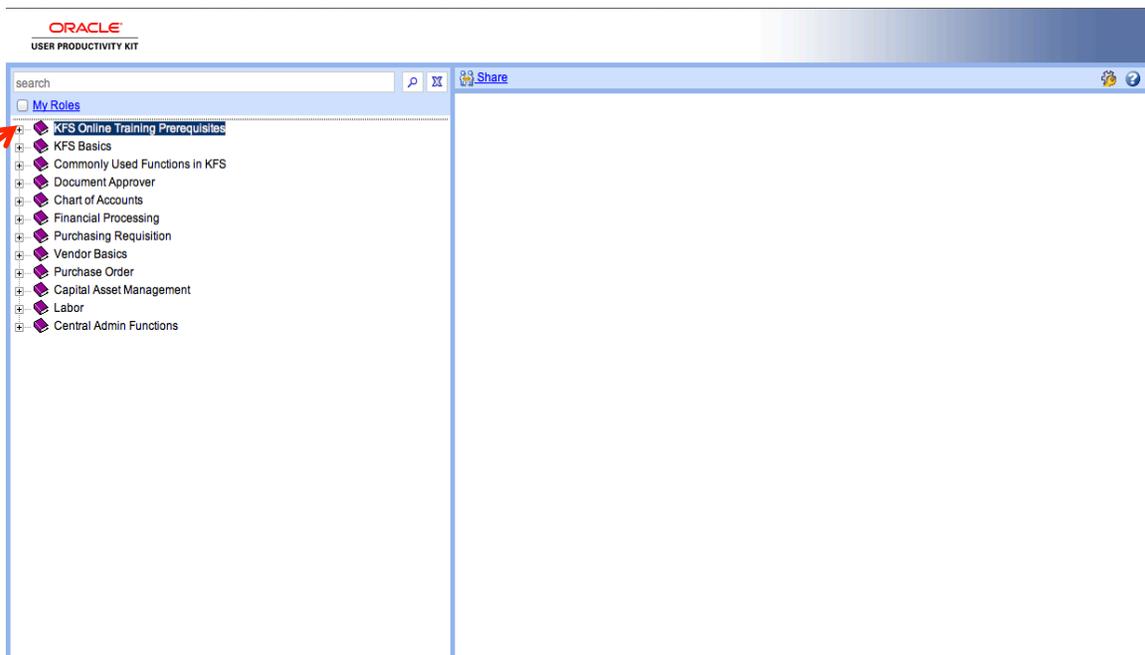
Step	Action
2.	Click the KFS UPK Online Tutorials link.



Step	Action
3.	<p>The CAS login screen will ask you for two pieces of information your Directory ID and Password.</p> <p>In this example, you will be signing into KFS using a Training ID and Password.</p> <p>Enter "kfstrain01" in the Directory ID: field.</p>
4.	<p>Enter "tstpwd01" in the Password: field.</p>
5.	<p>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.</p>



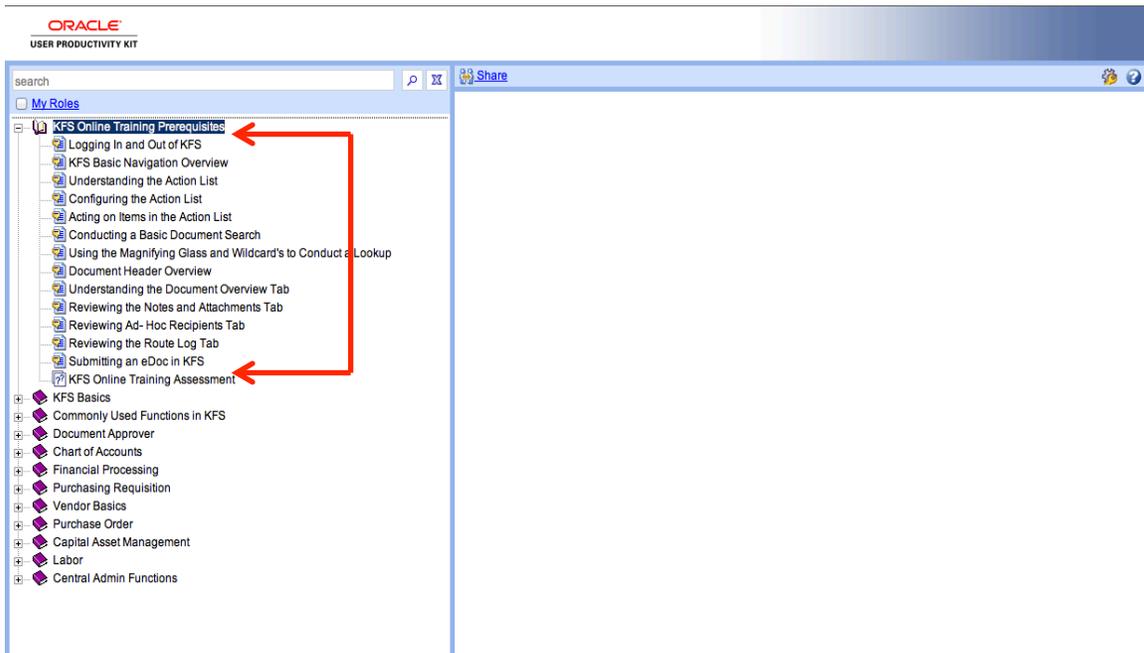
Step	Action
6.	Click the LOGIN button. 



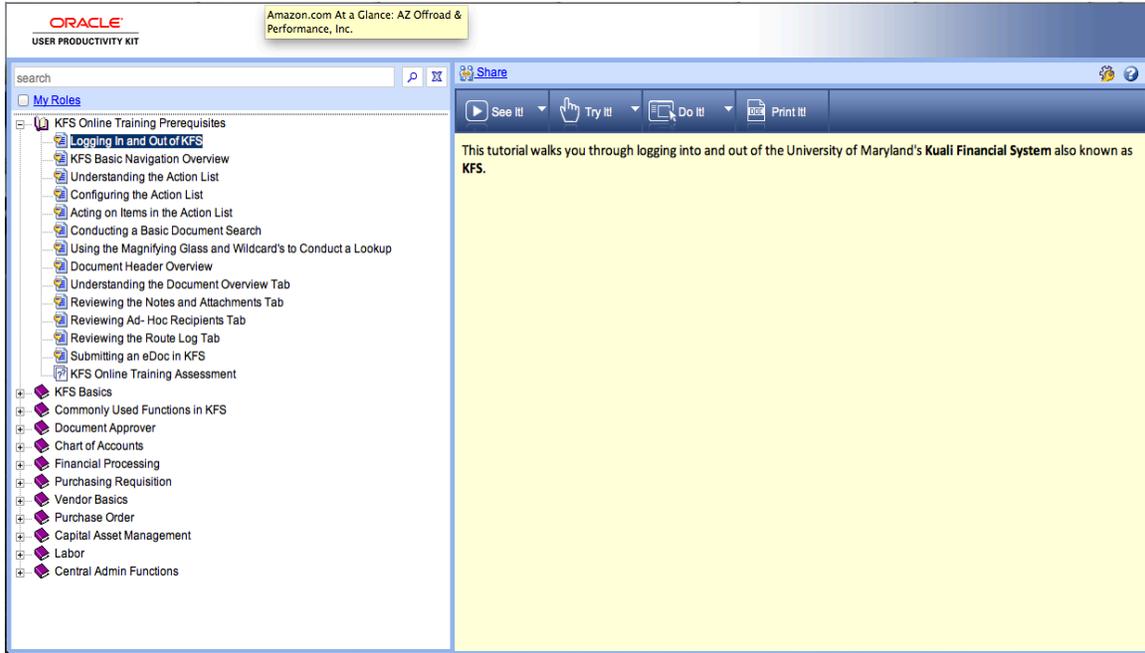
Step	Action
7.	The UPK Player will open in your browser. Note: KFS UPK Online Tutorials are outlined by Modules and Topics.

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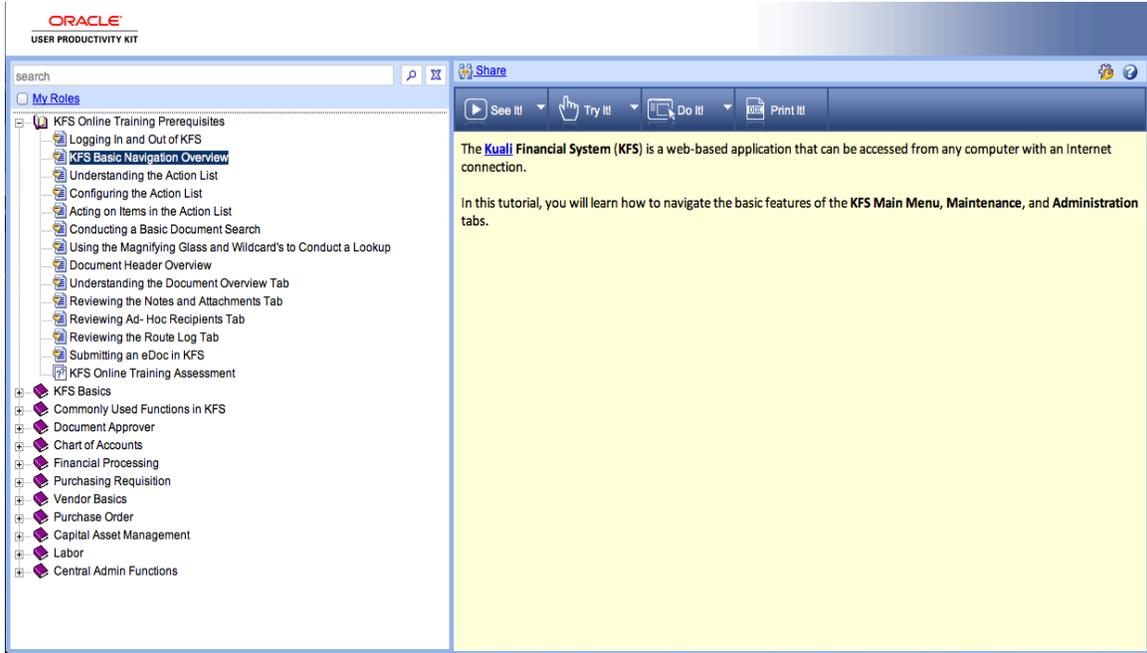
Step	Action
8.	<p>If you have a pop-up blocker installed on your computer, it will prevent some windows or tabs from opening in UPK.</p> <p>Note: Please contact your local IT department for directions on disabling your pop-up blockers. You may also try using a preferred search engine to search for directions on disabling your pop-up blockers.</p>
9.	<p>Click the "+" sign to expand the Module.</p> 



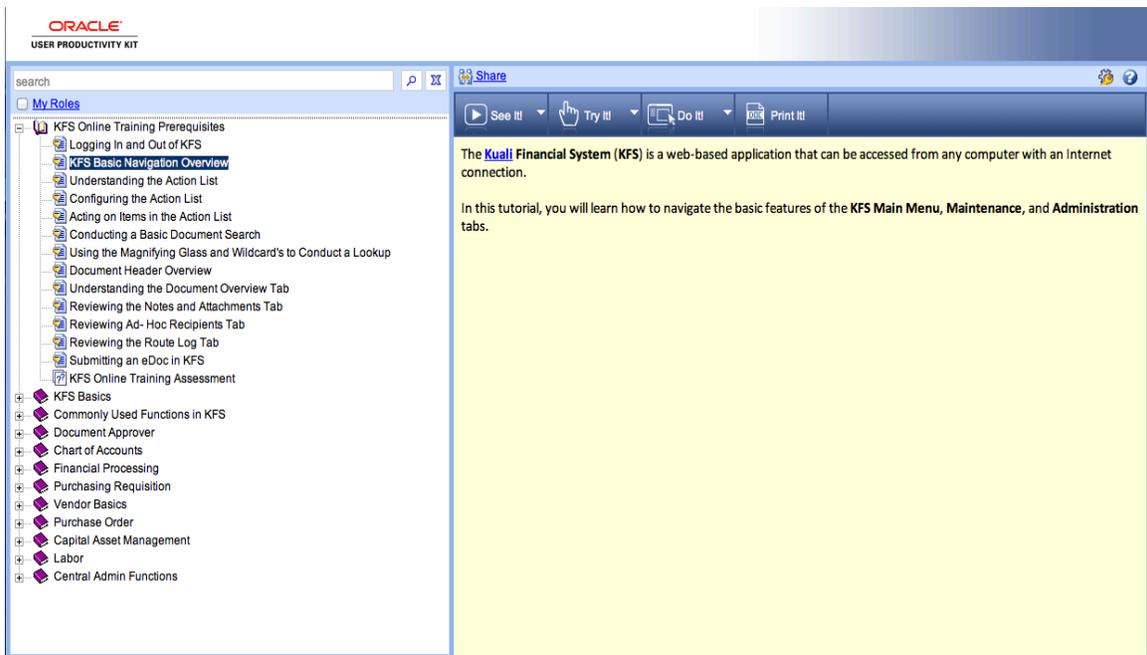
Step	Action
10.	<p>You may view any tutorial by clicking on the name of the tutorial you would like to view.</p> <p>Click the KFS Online Training Prerequisites module.</p> 
11.	<p>Once you click the KFS Online Training Prerequisite the folder will open to display the 13 topics and one training assessment that need to be taken prior to class.</p>



Step	Action
12.	<p>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.</p> <p>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.</p> <p>Enter "Basic Navigation" in the field.</p>
13.	<p>Click the search magnifying glass.</p> 
14.	<p>Any topics that contain the word(s) entered into the search field are now displayed.</p>

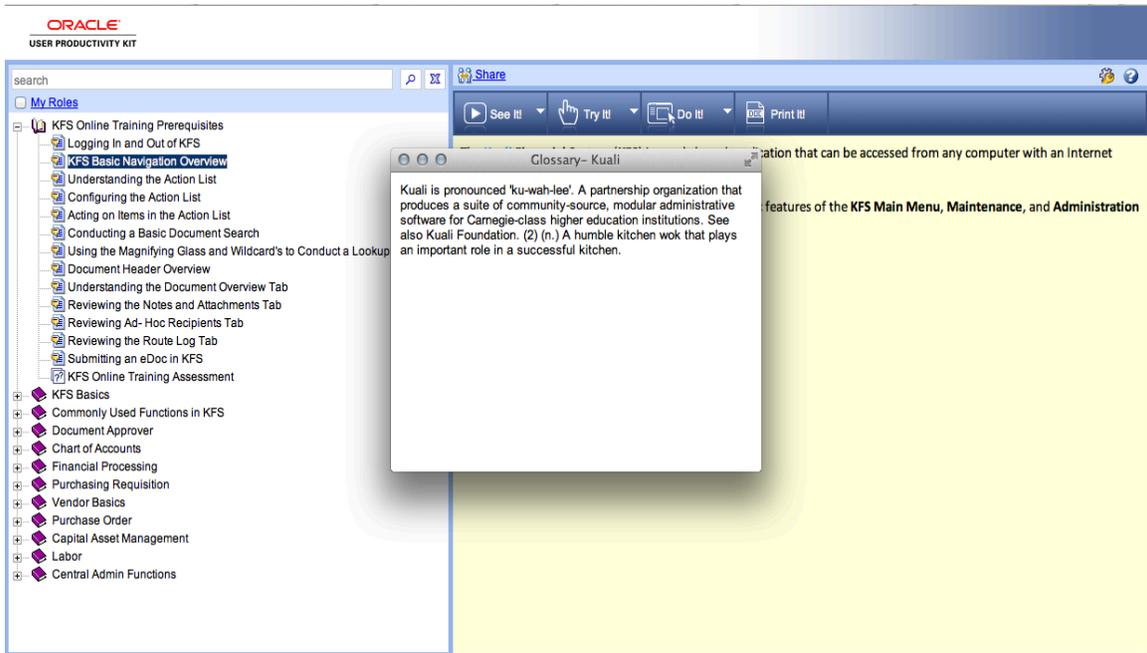


Step	Action
15.	<p>Click the [X] to clear the search results as well as the search text you entered and return to the outline.</p> <p>Click on the "[X]" field.</p> 

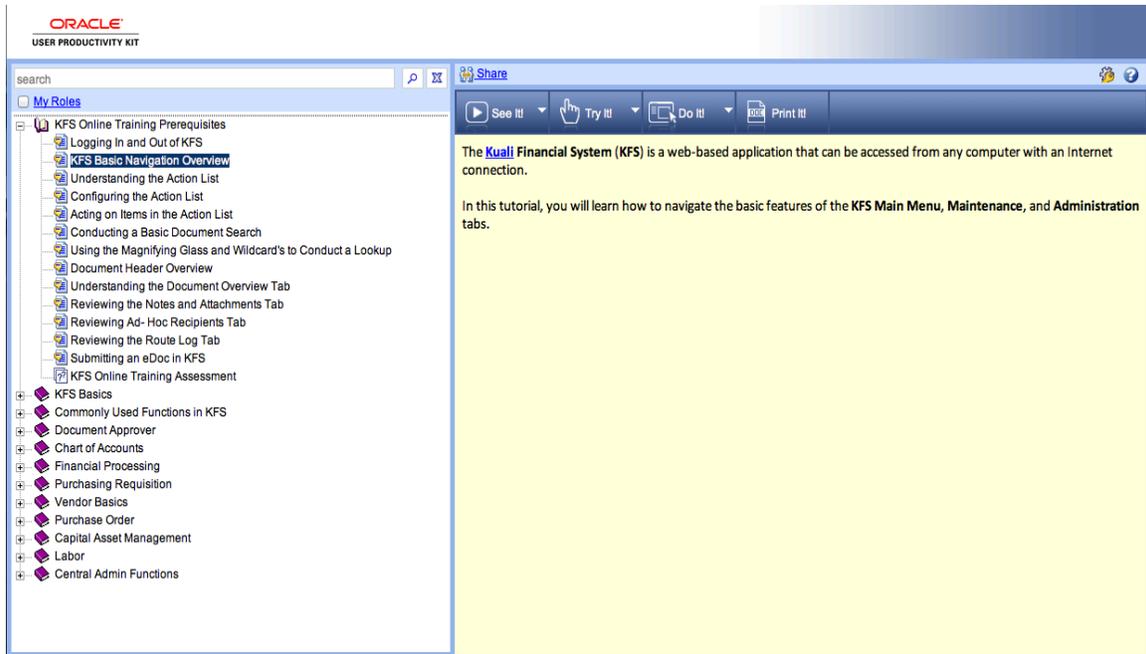




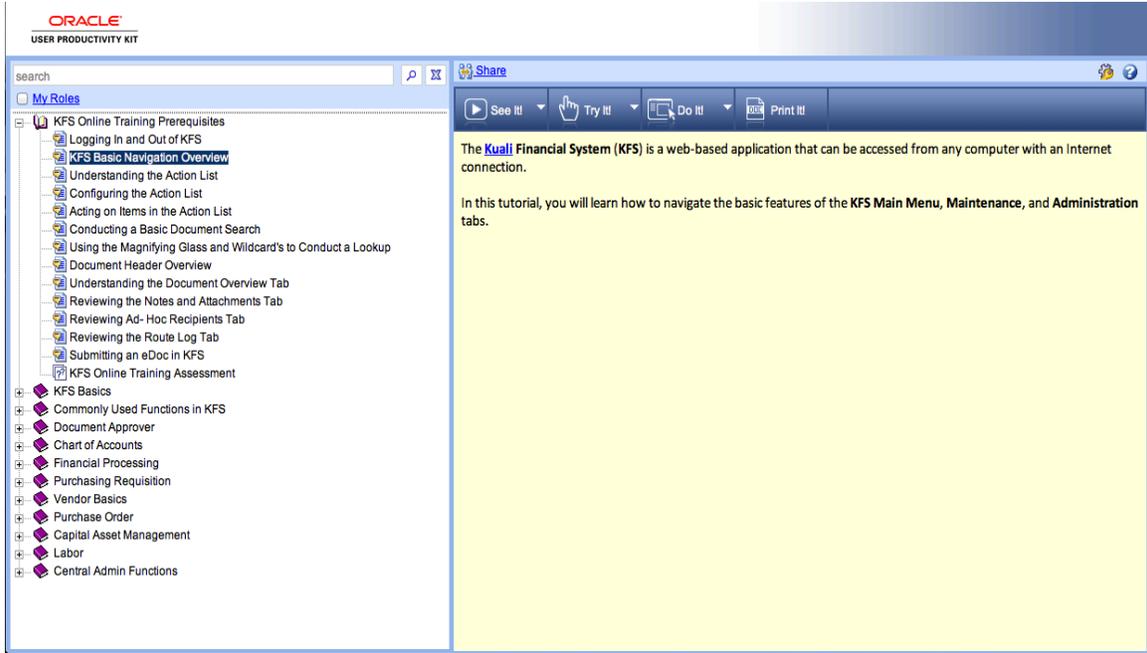
Step	Action
16.	To collapse a Module , click the "-" sign. 
17.	A word that is highlighted and underlined in a tutorial means you can drill down and find out more information about that term or link. Note: The UPK tutorials contain links to workflow documentation, dictionary terms, and links to a variety of useful webpages. Click the Kuali link. 



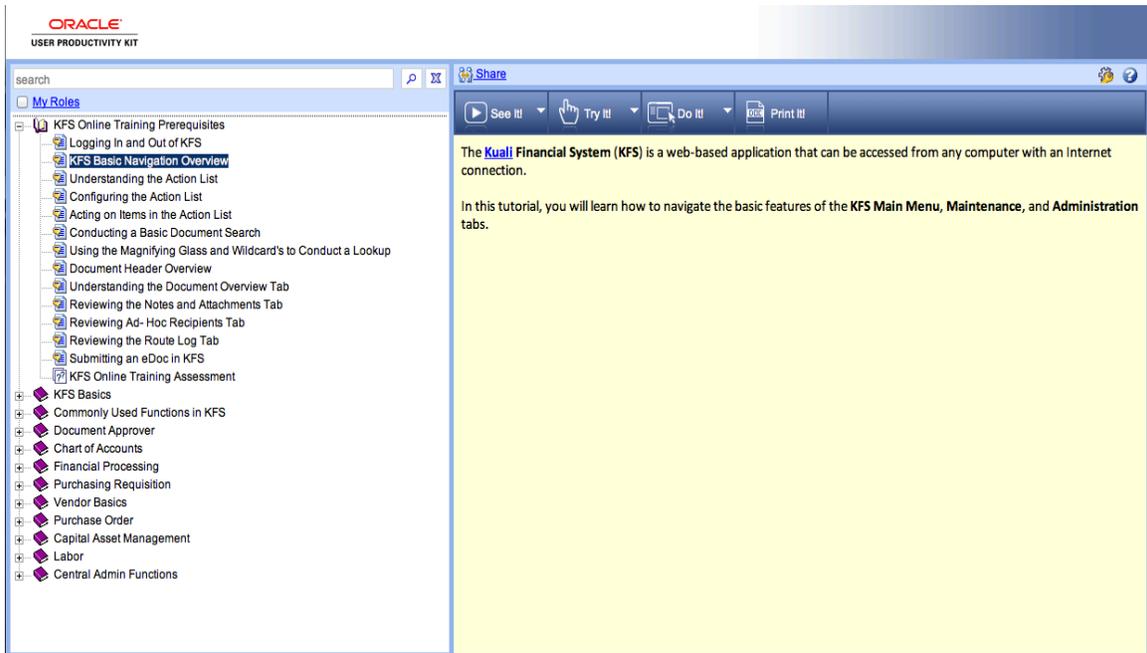
Step	Action
18.	In this example, you clicked on the highlighted and underlined word Kuali . This displays the Glossary window with the definition of the term you clicked on.
19.	Click the Close button. 



Step	Action
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.



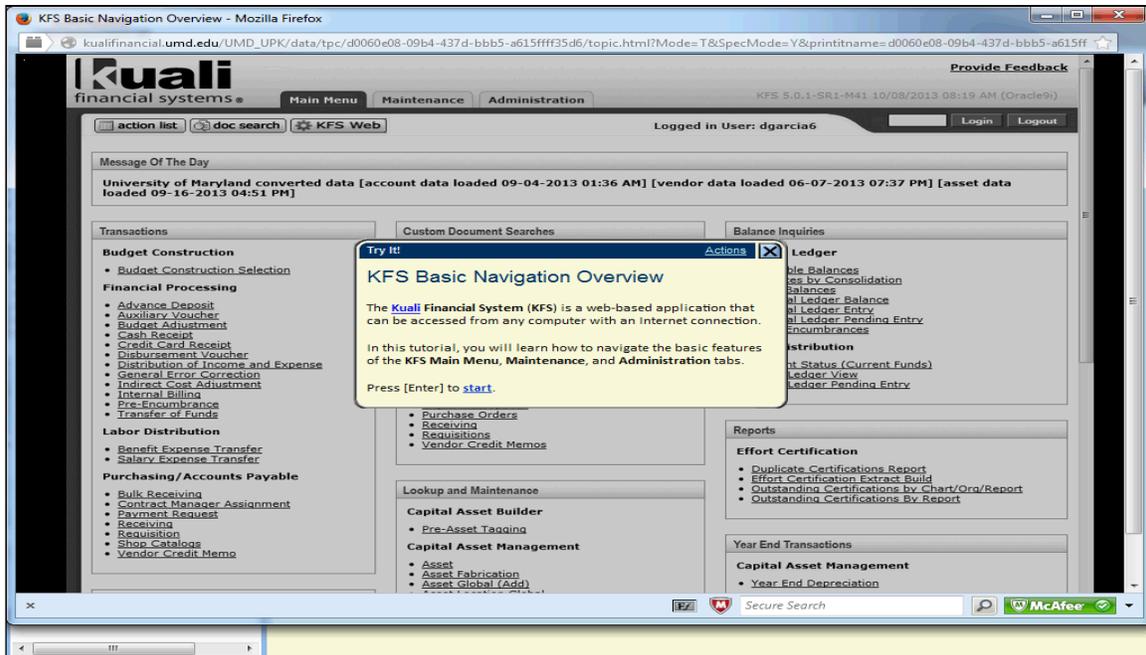
Step	Action
23.	<p>The Do It! Mode: allows for a popup window to open on top of the application and helps walk you through the process step-by-step.</p> <p>Note: The Do It! Mode in UPK is very useful if you want a little extra guidance as you are working through the system.</p>



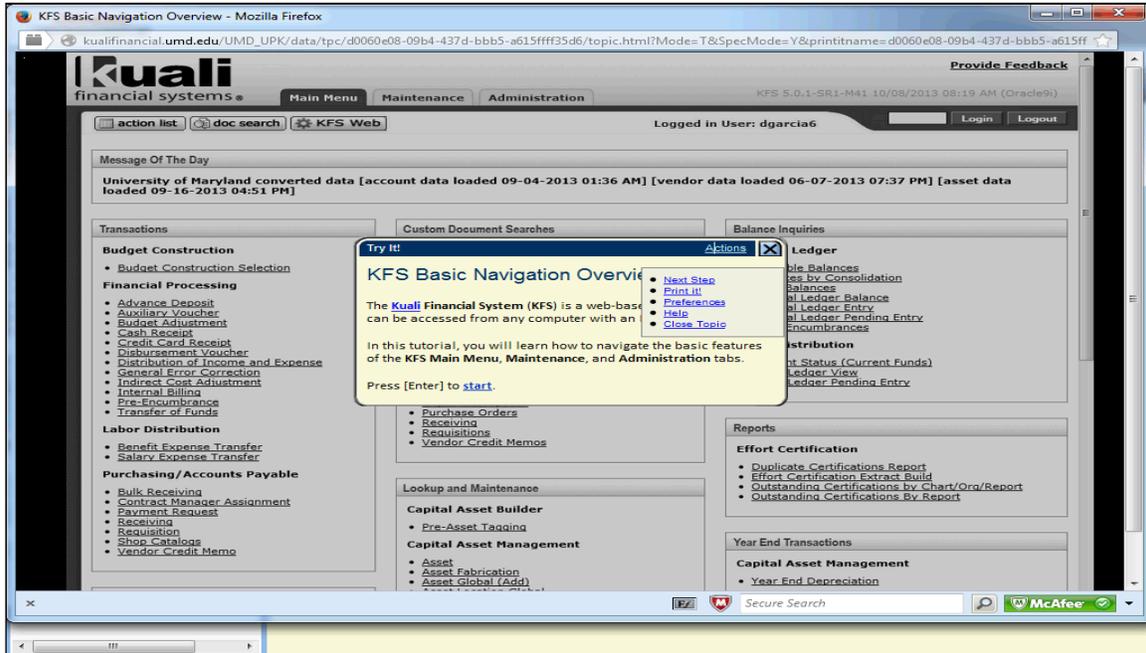


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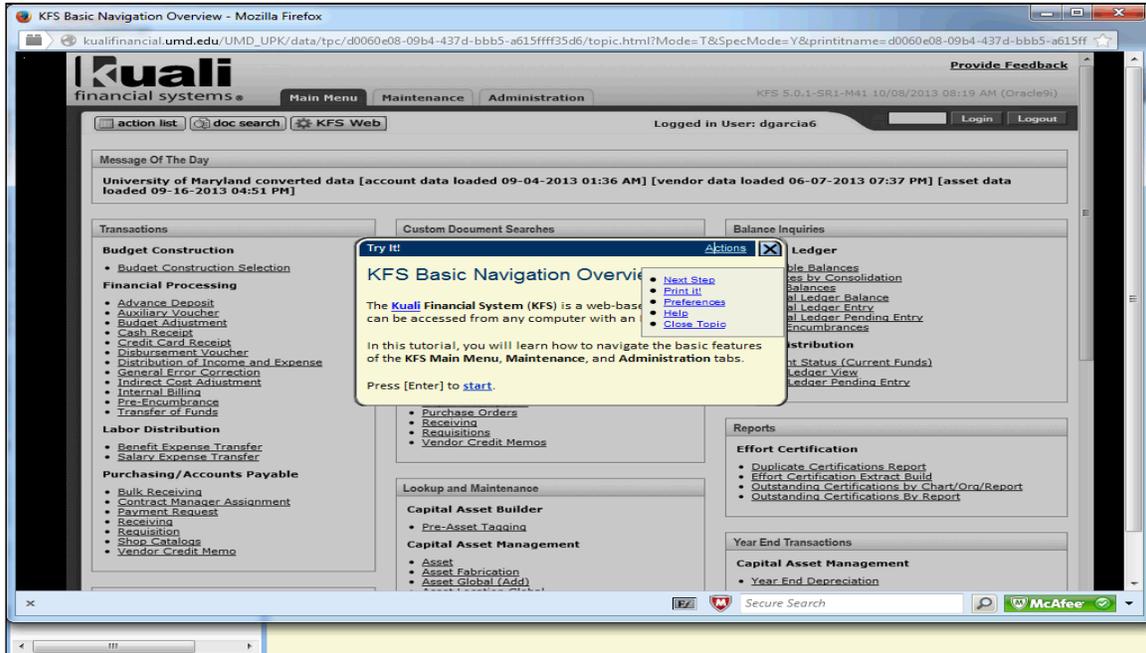
Step	Action
24.	The Print It! function allows you to print useful Job Aids with step-by-step directions. Note: Job Aids do not include screens shots.
25.	Now, you will access the KFS Basic Navigation Overview tutorial in Try It Mode . Click the “ Try It ” button.



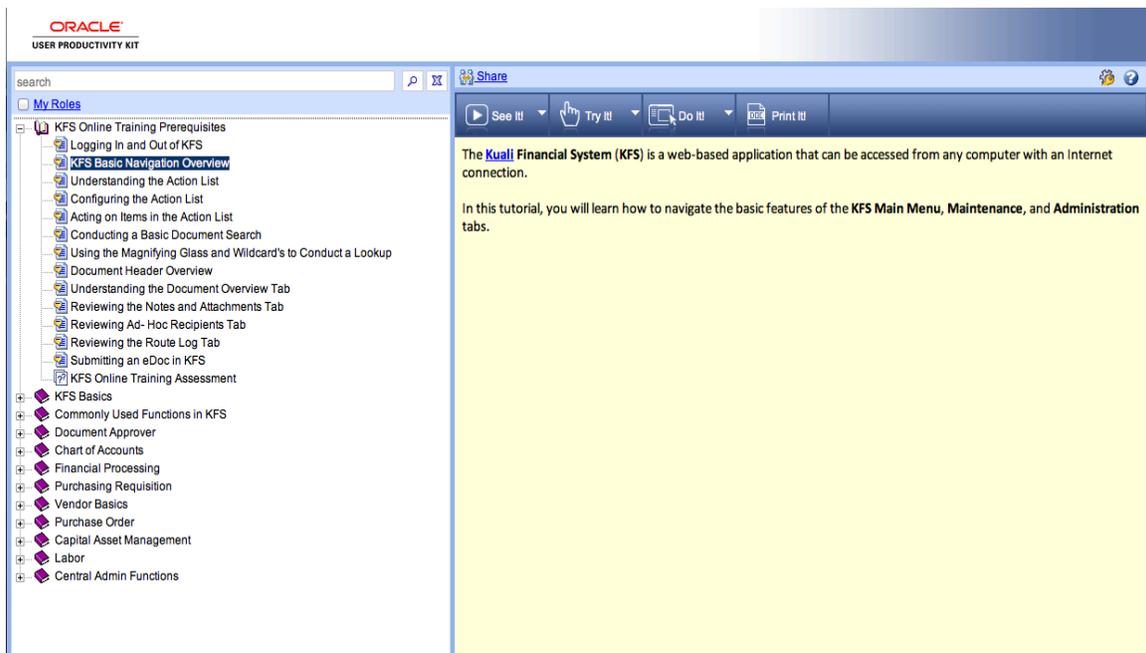
Step	Action
26.	Click the “ Start ” link to begin the tutorial.
27.	Click the “ Actions ” link within the context bubble.



Step	Action
28.	<p>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.</p> <ul style="list-style-type: none"> • 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.



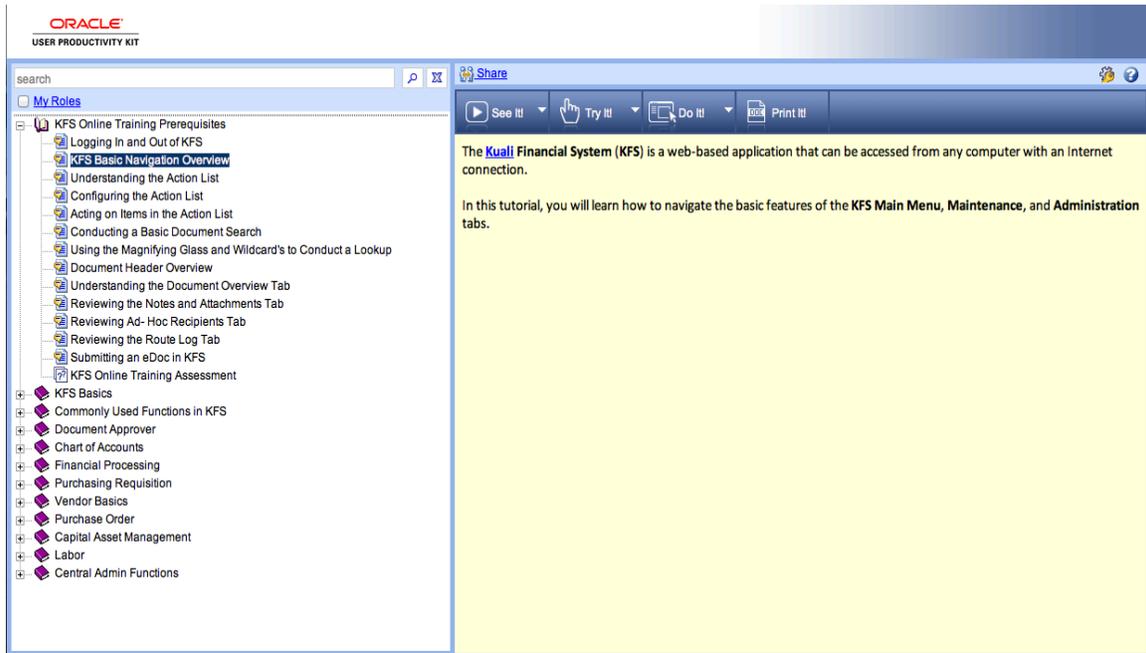
Step	Action
30.	<p>Click the Actions button and select the close topic link to return to the topic launch page.</p> <p>Click the “close topic” link.</p>





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Step	Action
31.	Click the Actions button and select the close topic link to return to the topic launch page. Click the “ close topic ” link.



Step	Action
32.	You have successfully completed the tutorial on Using KFS UPK Online Tutorials . End of Procedure