

How to use Financials Online Training

Overview

Online training was developed using a tool called UPK (User Productivity Kit). UPK offers online, interactive training for University of Alberta PeopleSoft users. This document will give you tips on how to use Financials Online Training.

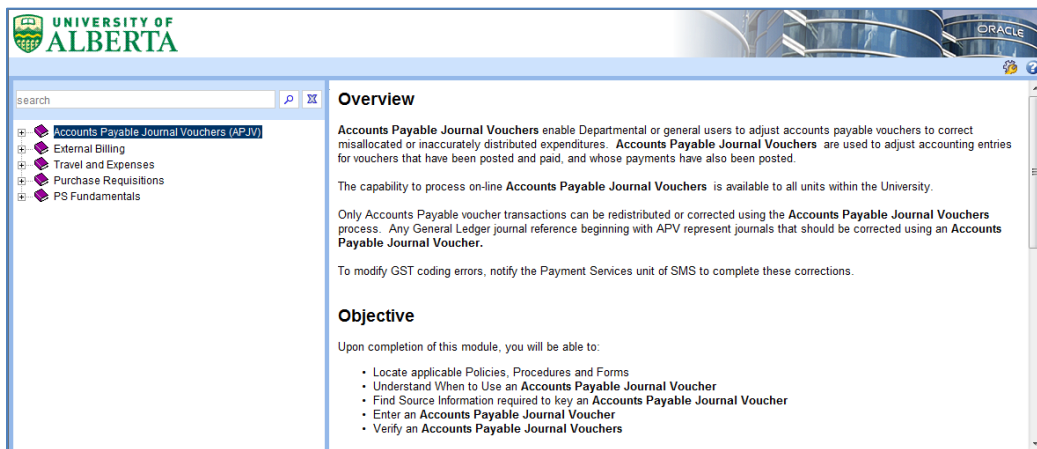
Financials Online Training can be accessed:

1. Directly through the Self-Service Center in PeopleSoft Financials
2. Through Community Information for [Employees](#) and [Researchers](#) as well as [PeopleSoft Training](#) on the AIS website
3. Through the [PeopleSoft User Training Program](#) site

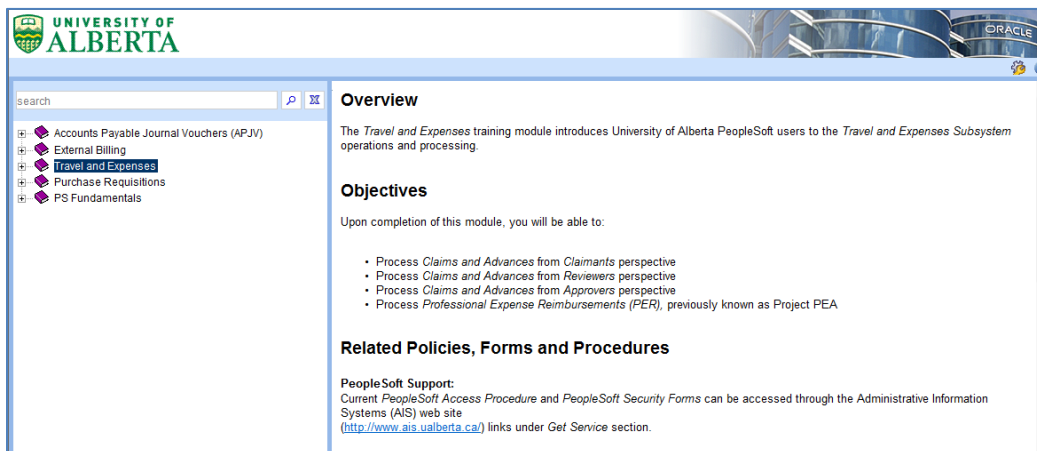
How to Use Financials Online Training

Step 1 - Click the Financials Online Training link to launch UPK player from the link provided.

A list of available modules within Financials 9.1 will appear.



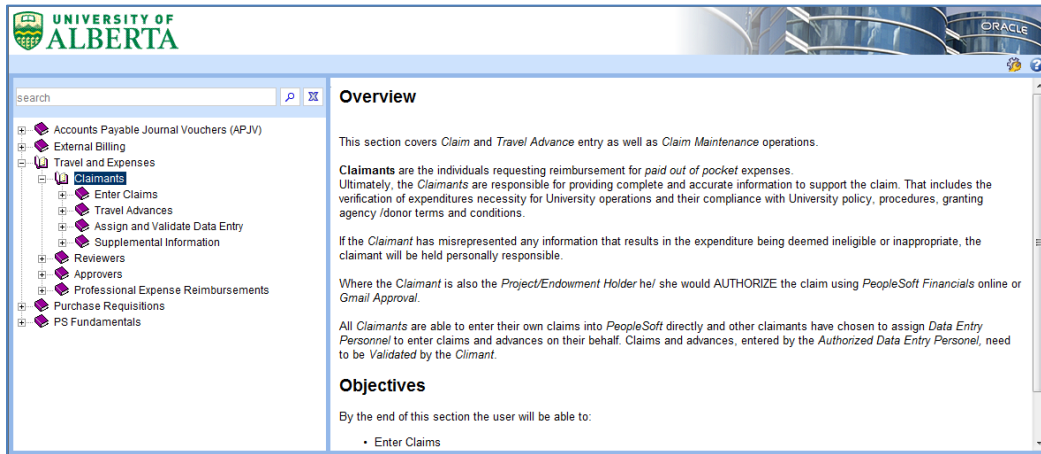
Step 2 - View information about a particular module, click on the module.




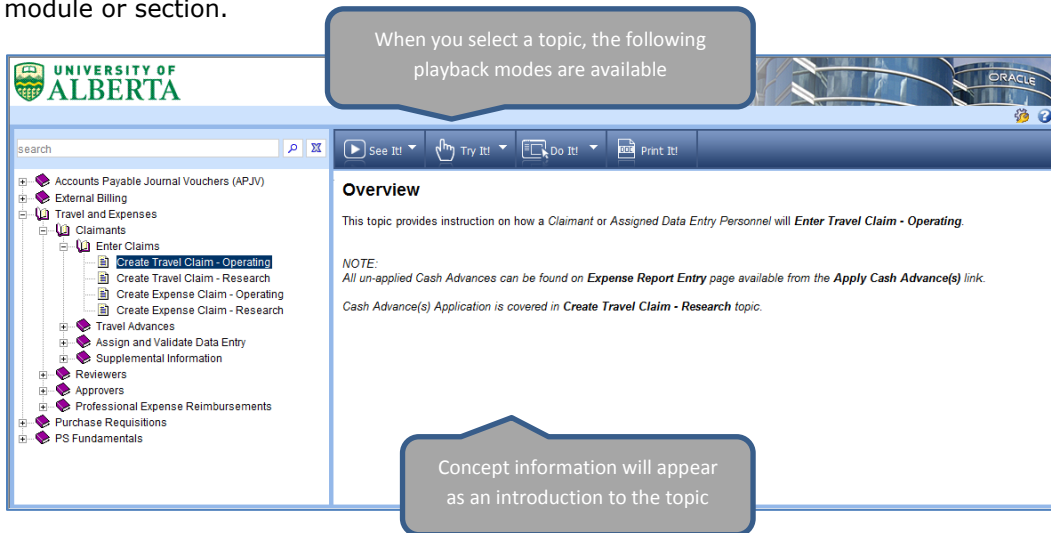
Step 3 - Double click the top level of the **Outline** menu to expand the **Module** sections and **Topics** or use the plus sign (+) on the left. Click the minus sign (-) to collapse the **Outline** menu.

The **Outline** expands and the **Modules** and **Topics** are displayed.

Step 4 - To view information about a particular module, click on the module.



Step 5 - To view the available sections and topics within a module, click on the plus sign  beside the module or section.



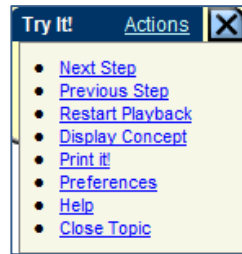
Step 6 - Click the desired **Playback Mode**:

- **See It!** - All required activities, such as moving the mouse and selecting menu items are automatically completed for the user
- **Try It!** - Enables interactive learning by prompting for the necessary mouse clicks or keystrokes to complete tasks in a simulated environment
- **Do It!** - Guides the user through a task while you are in the PeopleSoft Financials
- **Print It!** - Produces a Job Aid of the steps included in the topic generated to a word document.

Step 7 - Follow the online directions embedded in the topic.

Step 8 – An Action box can be displayed in See It! and Try It! Modes by clicking the [Actions](#) link in the bubble. Available actions include:

- Next Step
- Previous Step
- Restart Playback
- Display Concept
- Print it!
- Preferences
- Help
- Close Topic



Action boxes allow you to use the click-through function. Press the **Enter** key to quickly review the recorded steps.

Impact of Pop-up Blockers when using UPK

Your internet settings may have an impact on the use of UPK. Pop-up blockers must be disabled in your browser for this site. Ensure "Always Allow Pop-ups from This Site..." is selected.