

# User Productivity Kit Standards

## TITLES

A Title is the highest level container and is used to segregate each individual system documented in User Productivity Kit (UPK). All PeopleSoft applications must be documented in the standard PeopleSoft 8 title unless the documentation includes screenshots of a non-PeopleSoft system.

### Naming Convention

The Orion Training Team assigns the description for all titles. Before beginning development, the developer should contact the Orion Training Team to agree upon and create a title for their project.

## MODULES

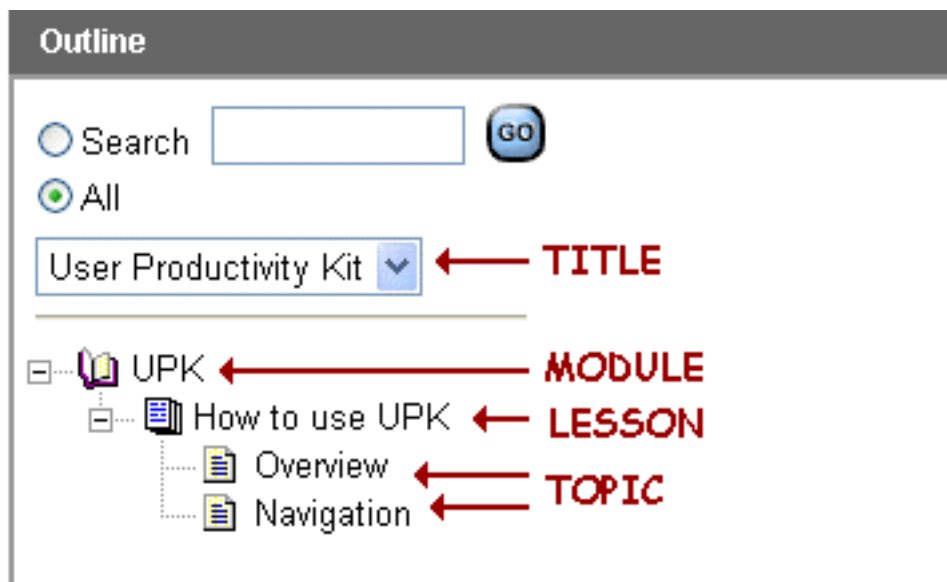
A Module is the highest level container within a Title. The module name can be anything that is descriptive of the general content of the module, although it must be unique within the title.

### Naming Convention

Since the length of a Module Name is long (63 characters), the Module Name should describe the section of the system being documented as completely as possible. All in-house developed PeopleSoft modules should be prefixed with the word “UofL” to distinguish internally developed documentation from PeopleSoft delivered documentation.

### Concept Area Usage

The Concept Area for each Module should contain a hyperlink to the UPK generated Training Manual, unless it is more appropriate to attach a hyperlink at the lesson level. The Training Manual should be stored in PDF format on the Orion Training website in Information Technology.



## **LESSONS**

A Lesson is the lowest level container within a Title. Lessons are used to group the topics.

### Naming Convention

Since the length of a Lesson Name is long (63 characters), the Lesson Name should provide as completely as possible, a descriptive overview of the topics it contains.

### Concept Area

The Concept Area for each Lesson should contain information that pertains to all of the contained topics as a whole. It should also contain a hyperlink to the UPK generated Training Manual, unless it is more appropriate to attach a hyperlink at the module level.

## **TOPICS**

The topic name is generally a brief statement describing the objective of the task covered in the topic.

Although it is not necessary to include every individual step of a procedure, the Topic should contain frames that indicate all necessary steps. Explanation frames may be used to indicate actual steps; however, sufficient action frames should be used so that the user experience is as similar as possible to actual system.

### Naming Convention

Since the length of a Topic Name is long (63 characters), the Topic Name should describe the procedure being documented as completely as possible.

### Concept Area

The Concept Area of a topic should include additional information that is needed by the user to complete the procedure. This area should also contain a link to the Job Aid document generated by the OnDemand developer. The Job Aid document should be stored in PDF format in the Orion Training website in Information Technology.

### Introduction Area

The Introduction Area contains the text that is entered into the bubble of the Introduction frame. This area should contain a brief statement explaining why the user may need to use the procedure being documented. Any prerequisite steps to the procedure should be documented in the Concept area.

## **PROPERTIES**

### Screen Resolution

The Screen Resolution of all titles must be 1024 x 768.

### Bubble Properties

The default color and font settings should be used for bubbles. Alternate color schemes may be used only to emphasize specific frames in a topic. If there is a compelling reason not to use the default settings for text, the text should nevertheless remain the same font face, style, and size throughout the entire topic. Boldfacing, underlining, italicizing, and alternate font colors and styles may be used to emphasize specific words, phrases, or passages.

### Frame Properties

Each frame in a topic should contain sufficient information for the user to understand exactly what is required to complete the step. Often, the default instructions are satisfactory; however, the user generally welcomes additional instructions or explanations. When additional information is long or complicated, Infoblocks should be used.

### Alternate Path/Action Frames

Alternate Paths and Alternate Actions are best used sparingly since they don't translate well to printed documentation. When recording a procedure, the complete menu path should be executed (i.e. avoid short cuts). Text can be added to any bubble to indicate that a shortcut exists.

### Decision Frames

Like Alternate Paths/Actions, Decision Frames should be used sparingly. When a Decision Frame is used, a "Jump-in" name should be specified for the Decision Frame and the Concept Area should indicate that a "Jump-in" name exists for the topic.

### Keyword Usage

The Search feature in UPK allows end users to quickly locate topics in the Player by entering keywords. UPK performs a search using the existing words contained in the Module, Lesson, and Topic names. If there are words you would like to add to these for searching purposes, you may do so using the keyword feature. Use of keywords is encouraged.

### Glossary Usage

As you create content, you may use specialized terms unique to your subject area, or terms that require further clarification for your end users. You can create glossary entries for these terms. Glossary terms are applied to an entire module. When the glossary term appears in custom bubble text, Introduction/End frame bubbles, or Plain Text Infoblocks in the module, it automatically becomes a link to a specified Infoblock. By default, when a glossary term appears multiple times in one location, only the first instance of the term is marked as a glossary link.

### Playback Modes

All Playback modes should be selected for each topic unless the topic does not contain steps to be completed within the application that is being documented. In that case, Know It and Do It modes should be disabled.

## **INFORMATION BLOCKS**

Infoblocks are used to provide conceptual or explanatory information about a topic and may be attached to a Module, Lesson, Topic, or individual Frame.

Infoblocks should be used in the following locations:

- Since each Lesson should encompass all or part of an Instructor Led Course, a Web Page Infoblock should be attached to the lesson referencing the Instructor Led Training Guide. The ILT Guide should be stored on the Orion Training website in PDF format.
- Each Topic should include a Web Page Infoblock referencing the associated Job Aid. The Job Aid document should be stored on the Orion Training website in PDF format.
- Infoblocks may be used liberally within topics to provide additional information to the user wherever it is deemed appropriate.

### Naming Convention

Each Infoblock should be named so that its contents are clear.

- The ID of Web Page Infoblocks referencing the ILT Guide should be in the form ILT\_XXX where XXX identifies the specific ILT. The Description should indicate that the document is the ILT Guide for that lesson.
- The ID of Web Page Infoblocks referencing the Job Aid should be in the form JOB\_XXX where XXX identifies the specific Job Aid. The Description should indicate that the document is the Job Aid for that topic.

### InfoBlock Types

Any type of Infoblock may be used in addition to the ILT Guide and Job Aid Infoblocks mentioned previously.

When Bitmap or Document Infoblocks are created, the option to “Copy to OnDemand content location now” should be selected.

### **TRANSPORTATION OF UPK CONTENT**

All content to be published on the UPK server must be submitted to the Orion Training Team in TPC (Standalone Topic File) format. The submitter must also provide documentation that indicates names of the Title, Title Folder, Modules, Lessons, and Topics, and specifies the exact order of the objects within the Title. When changes are made to content, the submitter must also indicate when Modules, Lessons, or Topics are being added, removed, or renamed.

It is the exclusive responsibility of the Orion Team to review all content prior to being published, to request modifications of submitted content, and to schedule the installation of such content. Since installing content on the UPK server requires that the web services be stopped, no content will be installed without notice of at least five working days.

### **UPK SERVER MAINTENANCE**

Maintenance of the UPK application and all UPK content on the web server is the exclusive responsibility of the Orion Training Team.

Maintenance of the UPK server Operating System, Web server, and any other associated system level application software is the exclusive responsibility of the LAN Team.

Preventative Maintenance may be performed, as deemed necessary by the Change Management Team, during the regularly scheduled Preventative Maintenance window (currently from 10 p.m. Fridays to 2:00 a.m. Saturdays). Maintenance may be scheduled and performed at other times by either the LAN or Orion Training teams as deemed necessary and with approval from the Change Management Team.