

## What is a “UPK”?

User Productivity Kit, also known as UPK, is an Oracle tool that will allow you to learn U of M-specific business processes at your work station, at your own pace, and at a time that fits in your work schedule.

UPKs are available in two places: on training web pages and directly in the “Help” button in PeopleSoft.



View a tutorial on how to use the UPK  
[z.umn.edu/learnUPK](https://z.umn.edu/learnUPK)

## Accessing a UPK in PeopleSoft

1. From any page in PeopleSoft, click the  **Help** link.

2. Use the **search** feature or navigate to the topic you wish to see by clicking the “+” buttons in the menu.

3. Select a play mode and view your UPK.

The screenshot shows the PeopleSoft interface with the UPK (User Productivity Kit) menu open. The menu is titled "UPK" and "PeopleBooks". The University of Minnesota logo and "Driven to Discover" tagline are visible. A search bar is present. The menu items include:

- PeopleSoft SA 9.0 - Academic Advising
- PeopleSoft SA 9.0 - Campus Community
- PeopleSoft SA 9.0 - Financial Aid
- PeopleSoft SA 9.0 - Admissions
- PeopleSoft SA 9.0 - Student Financials
- PeopleSoft SA 9.0 - Student Records
  - Navigation and User Defaults
  - Collaborative Class Scheduling (CACS)
  - Class Permissions
  - Program Plan
  - Term Activate a Student
  - Quick Admit
  - Enrollment Appointments
  - Enrollment Processes
  - Academic Standing
    - Adjusting Academic Standing
  - Service Indicators
  - Student Groups
  - Student Advisor
  - Student Milestones
  - Degree Clearance

At the top of the content area, there are three buttons: "See It!" (with a play icon), "Try It!" (with a hand icon), and "Print It!" (with a document icon). The main content area displays text about the academic standing process:

The academic standing process runs each semester, a few days after grades are due. The **Academic Standing** tab on the **Term History** page is where staff can make manual adjustments, when needed, to a student's academic standing.

Students will be able to view their academic standing online via **Student Center**. Each campus will set their own Academic Standing rules. A student's financial aid could be affected since their Satisfactory Academic Progress (SAP) will take **Academic Standing** into consideration.

### See It! mode

watch an animated, movie-like demonstration of tasks being performed in a simulated environment

### Try It! mode

learn interactively as a simulation guides you through a process with specific step-by-step instructions

### Print It! mode

view and print a Word document of processes from the tutorial

# A SAMPLING OF SOME AVAILABLE STUDENT SYSTEMS UPK TOPICS

## Navigation & User Defaults

Navigation Overview  
Setting User Defaults

## Collaborative Class Scheduling (CCS)

Scheduling New Classes

- One Component (Lec, Dir Stdy)
- Multiple Components using Auto-Enroll

Maintain Schedule of Classes

- Most Common CCS Changes
- Basic Data
- Meetings
- Enroll Cntl
- Reserve Cap tab
- Notes tab

Update Sections of a Class

Combined Sections

- Creating New
- Updating Existing

Waitlist Overview

Managing Waitlist

## Class Permissions

Class Permissions Overview

Creating Class Permission Numbers

Assigning Student Specific Permissions

Understanding the Permission Type Checkboxes

## Program Plan

Program Plan Overview

Processing a Discontinuation

Processing a Re-Admit

Processing a Leave of Absence

Processing a Return from Leave

Changing an Existing Plan

Adding Additional Plans for a Student

Removing an Existing Plan

Adding a Sub-Plan

Changing an Existing Sub-Plan

Adding Additional Sub-Plans

Removing an Existing Sub-Plan

## Term Activate a Student

Term Activating a Student's Record

## Quick Admit

Searching the Database for a Person

Quick Admit Process

Updating an Address

Setting Residency Status

## Enrollment Appointments

Appointments Overview

Adding an Enrollment Appointment

Updating an Enrollment Appointment

## Enrollment Processes

### Quick Enrollment

- Quick Enrollment Overview
- Adding a Class
- Dropping a Class
- Swapping Classes
- Changing Grade Basis
- Changing Variable Credits
- Adding a Student to a Wait List

### Enrollment Request

- Enrollment Request Overview
- Adding a Class
- Dropping a Class
- Swapping Classes
- Changing Grade Basis
- Changing Variable Credits
- Adding a Student to a Wait List

### Block Enrollment

- Creating a Student Block
- Creating Class Block
- Block Enroll Merge

## Academic Standing

Adjusting Academic Standing for Individual Students

## Service Indicators

Service Indicators Overview

Adding a Service Indicator

Releasing a Service Indicator from a Student Record

Issuing a Temporary Hold Release for Enrollment by Term

Mass Assign Service Indicators/ Batch Process

Mass Release Service Indicators/ Batch Process

## Student Groups

Student Groups Overview

Adding a Student to a Student Group

Inactivating and Reactivating a Student in a Student Group

Mass Assign - Adding/Inactivating Groups of Students

## Student Advisor

Student Advisor Overview

Adding an Advisor or Committee When None Currently Exists

Replacing an Advisor

Adding Additional Advisor/s to Existing Advisor/s

Updating the Advisor Page to Reflect a New Program and/or Plan

Removing an Advisor or Committee

Managing Committees

## Student Milestones

Student Milestones Overview

Adding Additional Milestones

Adding a Milestone Where None Currently Exists

## Degree Clearance

Degree Clearance Overview

Clearing a Student (College Processing)

## Transcripts

Producing a University of Minnesota Transcript

- single
- multiple

## Credit Exemption

Credit Exemption Entry

Revoking a Permanent Exemption

## Enrollment Verification/Cert Letter

Enrollment Verification/Cert Letter

...AND MUCH MORE!

Click the Help link in PeopleSoft to view all available topics.



*This list is subject to change. Last updated 04/10/2015.*

This publication is available in alternative formats upon request.

Direct requests to the ASR Training & Support disability resources liaison at 612.625.2803.