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.

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.

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.