Oracle’s User Productivity Kit

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Agenda

• Addressing User Competency and Support Issues
• What is the User Productivity Kit (UPK)?
• UPK Demo
• Q&A
Importance of User Competency

76% of Firms Polled Face User Competency Challenges

- Highly Competent
  Our end users have the ability to perform their jobs more effectively due to competency in using the application and knowledge of how it supports our processes.

- Competent
  Our end users fully understand the software and are able to gain full benefit of its functionality.

- Sub-Standard
  Our end users have a sufficient understanding of the software but are not gaining full benefit of its functionality.

- Failing
  Our end users are struggling to make use of the software

How competent are your end users?

Source: ERP Competency Multi-Client Study, META Group 2003
End User Adoption Is Key to Value Realization

Effective user adoption is the primary determinant of the success of a project implementation.

Source: Neochange
Development Challenges

• Resources – who is going to do the work?
  • Limited training, business, and technical resources.

• Time – do we have the time to do the work?
  • Instructor-led training development time = 40:1*.
  • Web-based training development time = 200:1*.

• Budget – do we have the budget to do the work?

*The ASTD Media Selection Tool for Workplace Learning by Raymond J. Marx.
Implementation/Upgrade Challenges

• How will I manage change in my organization?
• How can I minimize risk to my company?
• Should I change my business processes or should I customize the application?
What is UPK?

Oracle’s User Productivity Kit is the collaborative content development platform to drive user productivity and mitigate risk throughout all phases of the software ownership lifecycle.
Value Proposition

• **Maximize ROI**
  - Realize value throughout software ownership lifecycle via multiple deliverables from a single authoring session
  - Accelerate time to value by enabling rapid user adoption via instructionally sound, just-in-time learning
  - Deliver value globally with internationalized capabilities

• **Manage Knowledge**
  - Capture best practices and empower users with discrete recording capability and multiple publishing outputs
  - Manage and collaborate on content development via a multi-user authoring environment
  - Deliver JIT learning via context-sensitive help menu integration

• **Mitigate Risk**
  - Drive pre and post-implementation change management with end-user support materials and competency checking
  - Ensure consistent approach to business processes and tasks among current and new employees
  - Contribute to regulatory compliance via system process documentation
UPK Throughout the Project Lifecycle

Documentation
- Process Guides
- User Acceptance
- Test Scripts

Training
- Instructor-led Training
- Web-based Training
- Job Aids
- Usage Tracking

Go-Live

Performance Support Material
- Simulations
- Application Coach
- Job Aids
- Usage Tracking

Multi-user Content Management Capabilities

UPK Developer
- Single Source Development and Customization

- Check In/Check Out
- Version Control
- History
- Rollback
Oracle User Productivity Kit

Single recording produces multiple outputs for use throughout the entire software lifecycle.
### UPK Usage Tracking

**Main Page**

#### Reports
- Edit/Run reports
- Refresh Outline

#### User Access
- Add new user
- Edit existing user
- Delete user and usage history

**View Error Log**

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**Usage Tracking**

#### Selected Details - Page: 1

<table>
<thead>
<tr>
<th>Date/Time</th>
<th>Application Module</th>
<th>Lesson</th>
<th>Topic</th>
<th>User</th>
<th>Time</th>
<th>Mode</th>
<th>Score Passed</th>
</tr>
</thead>
<tbody>
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<td>PeopleSoft 8.8 Budgeting</td>
<td>Using Budget Work Items and Versions</td>
<td>Sending Users Emails About a Budget</td>
<td>jfaulk</td>
<td>00:00:08</td>
<td>Try It!</td>
<td></td>
</tr>
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<td>PeopleSoft 8.8 Budgeting</td>
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<td>Introduction to PeopleSoft Budgeting</td>
<td>Understanding Roles within Budgeting</td>
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<td>00:00:11</td>
<td>Try It!</td>
<td></td>
</tr>
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<td>Using Budget Work Items and Versions</td>
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<td>Hiring Employees</td>
<td>Understanding the Lifecycle of an Employee</td>
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<td>Try It!</td>
<td></td>
</tr>
<tr>
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<td>Creating Leads</td>
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<td>Try It!</td>
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</tr>
<tr>
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<td>PeopleSoft HR 8.8 - Administer Workforce</td>
<td>Hiring Employees</td>
<td>Adding a New Employee</td>
<td>jfaulk</td>
<td>00:00:39</td>
<td>Try It!</td>
<td></td>
</tr>
<tr>
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<td>PeopleSoft HR 8.8 - Administer Workforce</td>
<td>Hiring Employees</td>
<td>Adding a New Employee</td>
<td>jfaulk</td>
<td>00:01:52</td>
<td>Do It!</td>
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</tr>
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<td>Adding a New Employee</td>
<td>jfaulk</td>
<td>00:00:18</td>
<td>See It!</td>
<td></td>
</tr>
</tbody>
</table>
Language Capabilities

- English*
- French*
- German*
- Spanish*
- Japanese*
- Swedish
- Canadian French
- Finnish
- Turkish
- Polish
- Italian
- Portuguese
- Danish
- Mexican Spanish
- Chinese (Simplified & Traditional)
- Norwegian
- Dutch
- Russian
- Hungarian
- Korean

*UPK Developer Languages

The UPK Developer can export custom text to an .xliff or .doc format.

Localized screens are captured with ‘re-record’ mode.
UPK Summary

- Collaborative, multi-user environment
- Built-In Object Recognition
- Context Sensitive Help
- Easy Recording and Editing
- Single Development Platform
- Value throughout the Software Lifecycle
UPK Demonstration
UPK for E-Business Suite

Oracle User Productivity Kit

Outline
- Search
- All
- Applicable

Concept
Using Accounts Receivables enables you to manage receipts, transactions, invoices, customers, and credits through a series of workbenches.

Oracle Receivables provides four integrated workbenches that you can use to perform your day-to-day Accounts Receivable operations. You can use the Receipts Workbench to perform most of your receipt-related tasks and the Transactions Workbench to process your invoices, debit memos, credit memos, on-account credits, chargebacks, and adjustments. The Bills Receivable Workbench enables you to create, update, remit, and manage your bills receivable.

Introduction
Many organizations provide health benefits to their employees. Health benefits include dental, vision, hearing, and medical plans. Using PeopleSoft Human Resources, you can enter an employee's health benefits information.

In this topic, an employee requests coverage under the BC Provincial health benefit plan. Your goal is to enter the health benefits information for the employee.
## UPK for JDE

### Speed Voucher Entry - Speed Voucher Entry

<table>
<thead>
<tr>
<th>Supplier Number</th>
<th>Company</th>
<th>Invoice Number</th>
<th>Invoice Amount</th>
<th>Service/Tax Date</th>
<th>Doc No/Type/Co</th>
<th>PO No/Type/Co</th>
<th>Prev Doc</th>
<th>Discount</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Invoice Data
- **Invoice Date**: [Field]
- **Due Date**: [Field]
- **AP Approvers**: [Field]
- **Currency Code**: [Field]
- **Exchange Rate**: [Field]
- **Amount**: [Field]
- **Remaining**: [Field]

### Business Details
- **Business Unit**: [Field]
- **Payment Terms**: [Field]
- **Pay Status**: [Field]
- **Cat Code**: [Field]
- **Batch Number**: [Field]

### Additional Information
- **Amount**: [Field]
- **Units**: [Field]

### Customize Grid Options
- [Customize Grid]
UPK for JDE

The **Supplier Number** is a user defined name or number that identifies an address book record. You can use this field to enter and locate information.

Enter the desired information into the **Supplier Number** field. Enter a valid value; e.g., "4360".
# Hyperion Content in UPK

![Hyperion Workspace interface](attachment:image.png)

### Table Example

<table>
<thead>
<tr>
<th>Account Description</th>
<th>Assumption</th>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
</tr>
</thead>
<tbody>
<tr>
<td>503100: Office Supplies Expense</td>
<td>Even</td>
<td>45,876</td>
<td>3,806</td>
<td>3,806</td>
</tr>
<tr>
<td>503200: Postage and Freight</td>
<td>4-4-5</td>
<td>44,295</td>
<td>3,407</td>
<td>3,407</td>
</tr>
<tr>
<td>503300: General Supplies</td>
<td>69,971</td>
<td>7,214</td>
<td>7,214</td>
<td>7,214</td>
</tr>
<tr>
<td>504100: Telephone Expense</td>
<td>5-4-4</td>
<td>75,725</td>
<td>5,825</td>
<td>5,825</td>
</tr>
<tr>
<td>504200: Cellular Charges</td>
<td>4,547</td>
<td>4,514</td>
<td>4,514</td>
<td>4,514</td>
</tr>
<tr>
<td>504300: Internet</td>
<td>40,018</td>
<td>5,999</td>
<td>5,999</td>
<td>5,999</td>
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<td>504400: Telecommunications</td>
<td>162,690</td>
<td>13,738</td>
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<tr>
<td>505100: Individual Contractors</td>
<td>Prior Yr</td>
<td>45,276</td>
<td>3,960</td>
<td>2,348</td>
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<tr>
<td>505200: Consulting Firms</td>
<td>Manual</td>
<td>720</td>
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<td>5056100: Consulting Services</td>
<td>45,276</td>
<td>4,600</td>
<td>2,348</td>
<td>2,131</td>
</tr>
</tbody>
</table>

### Importantly

- Left click on Supporting detail icon to add supporting detail.
“Just In Time” Support (EPSS) – Do It!

What is EPSS?
Electronic Performance Support System is support integrated into the Help System of an application (HEMI)

EPSS results in:
• 11% fewer errors
• Reduces overall time or speed to task by 65%*

Oracle UPK Delivers Results

Targeted technology investments can deliver up to ten times the impact of traditional IT cost reduction efforts.

- **Silicon Image**: Achieved efficiency gains of 80% to 90% in document preparation.
- **EMI**: 60% reduction in online training material creation.
- **NHS**: Gained a 100% return on investment in six months.
- **IBDO**: Replaced six different content development tools to one.
- **Berlin Packaging**: Lowered training costs by 70%.
- **ConAgra Foods**: Reduced documentation content development time by 75%.
- **3M**: Standardized enterprise application training for 60+ apps with UPK.
- **Medtronic**: Content leveraged and maintained in multiple languages.

*Managing IT In A Downturn, McKinsey on Business Technology, Fall 2008*
SOFTWARE. HARDWARE. COMPLETE.