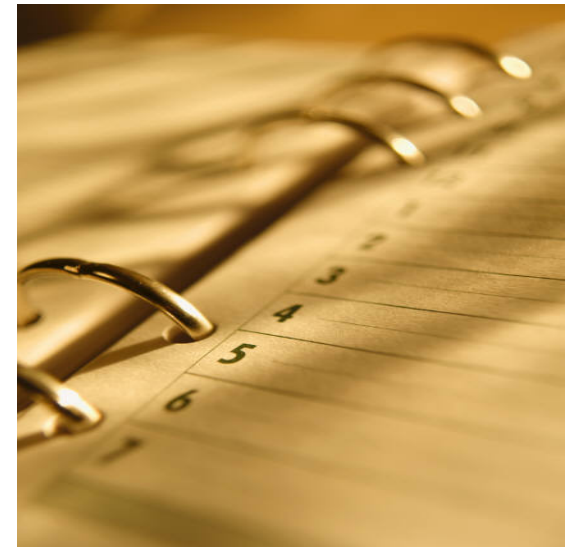


# Roadmap to UPK Version 3.1 Session 1

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OAUG Collaborate '08  
April 14-17, 2008

# Agenda

- What is UPK?
- Content Management in UPK 3.1
- Building an Outline in UPK 3.1
- UPK 3.1 Exercise



# Solbourne Overview

- Solbourne provides Enterprise solutions based on Oracle Fusion Middleware technology and Oracle's E-Business Suite and PeopleSoft Enterprise applications
- Our goal is to help our customers realize the full benefit of their investment in Oracle technology
- Solbourne's 15 years of success, depth of experience and commitment to customer success have established us as a leader in the Oracle community



# What is UPK?

Oracle's User Productivity Kit ...

... provides a Complete Documentation and Training Solution based on a single-source recording of an Oracle task.

1. UPK Developer
2. UPK Usage Tracking
3. UPK Developer Recordings

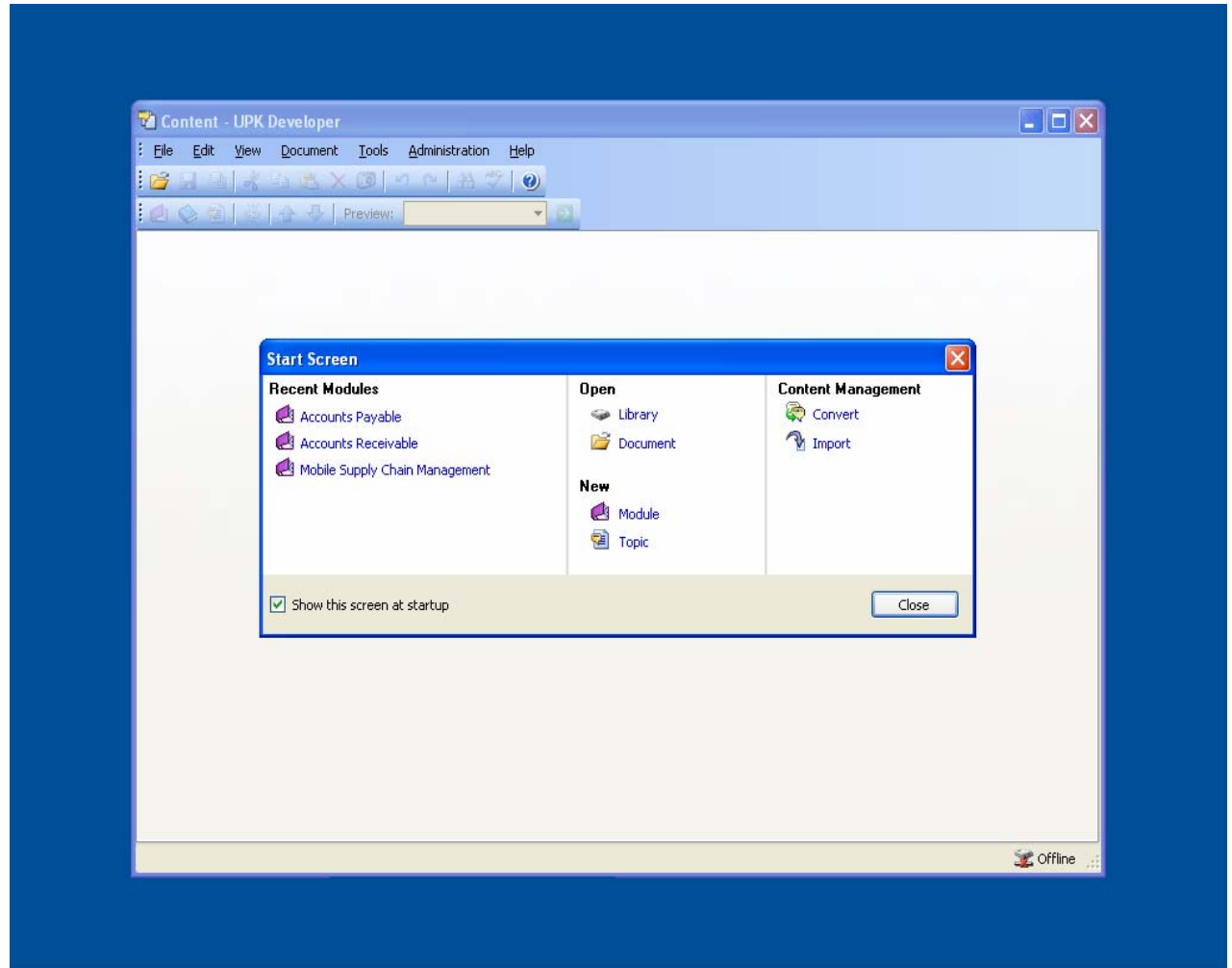


# What is UPK?

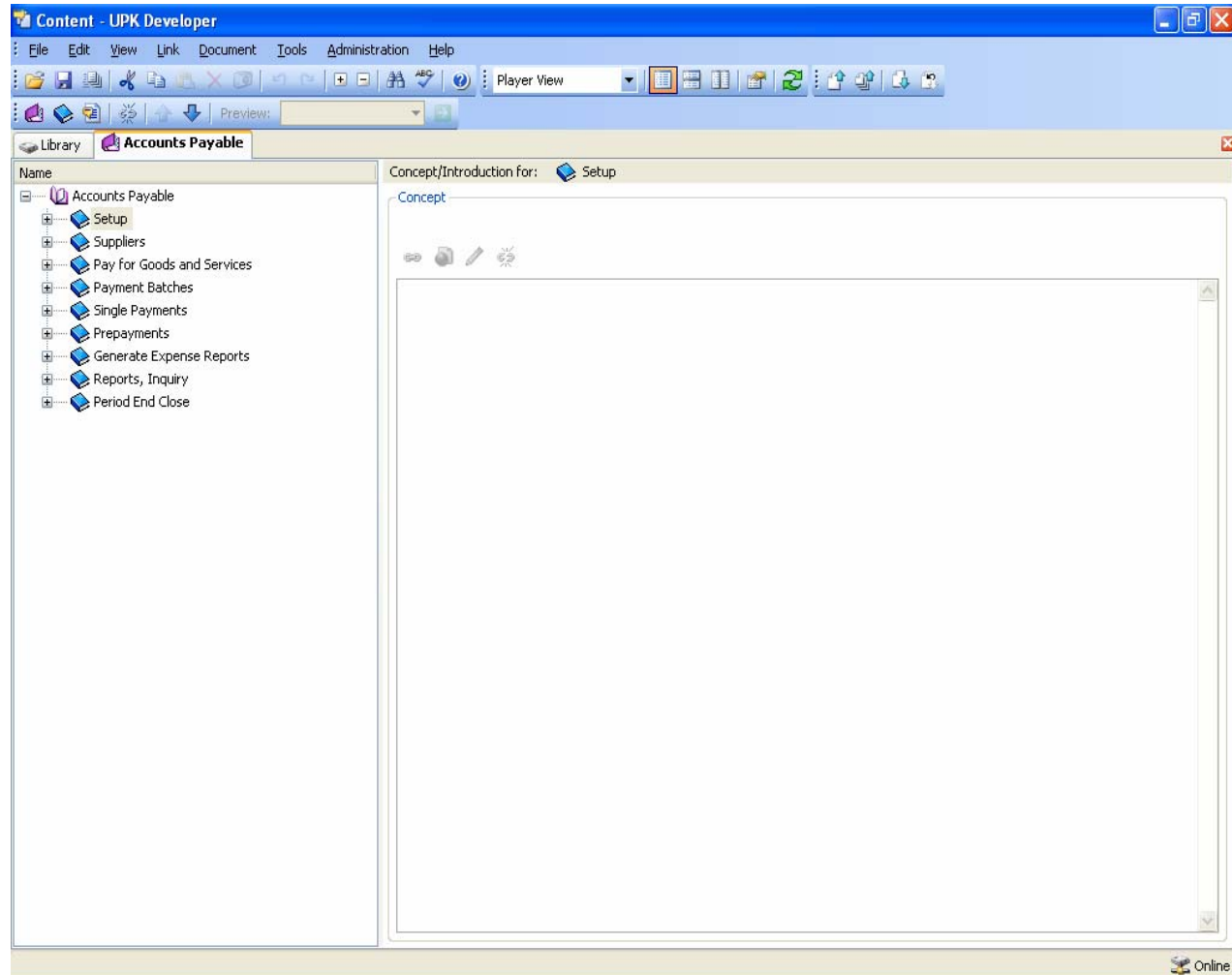
- UPK Developer
  - Synchronized software platform for creating and customizing training and documentation content
  - Recording technology that enables single source content creation by doing the task in the Oracle application



# UPK Developer



# UPK Developer



# UPK Developer - Record and Edit

- Record UPK Content by pressing the [PRINT SCREEN] key for each action taken in the Oracle transaction.
- Use the UPK Developer Topic Editor to edit frames, screens or text.
- Use the default image editor (MS Paint) to edit the screen image.



# UPK Developer Recording

The screenshot shows the Oracle Applications interface with a recording overlay. The recording window, titled "Recorder - New Topic", contains the following text:

Press PrintScreen to begin recording.  
Next screenshot records: Start Screen  
Last recorded event:

The main application window displays a table with the following columns: Type, Operating Unit, Trading Partner, Supplier Number, Supplier Site, and Trading Partner Address. The first row is highlighted in yellow and contains the text "Manua Vision Operations".

Type	Operating Unit	Trading Partner	Supplier Number	Supplier Site	Trading Partner Address
Manua	Vision Operations				

Below the table, there is a section with columns: Number, Date, Amount, GL Date, and Payment Amount. The first row is highlighted in blue.

Number	Date	Amount	GL Date	Payment Amount

At the bottom of the application window, there are buttons for "Invoice Overview", "Accounting Unprocessed", "Actions... 1", "Enter/Adjust Invoices", and "Payment Overview".



# UPK Developer Editing

The screenshot displays the Oracle UPK Developer interface for editing a customer record. The main window is titled "UPK Developer - Oracle 11i (Create Customers)". Below it, the "Oracle Applications - Vision(8017)" window shows the "Customers - Standard" form. The form fields include:

- Customer Type: Organization (selected)
- Name: ABC Rental Services
- Alternate Name: (highlighted in red, with a tooltip)
- Account Name: (empty)
- Organization Number: (empty)
- Customer Number: (empty)
- Tax Registration Num: (empty)
- Taxpayer ID: (empty)

A yellow tooltip titled "Try It!" is positioned over the "Alternate Name" field. The tooltip text reads: "Enter an alternate name for the customer. Type ABCRS in the ALTERNATE NAME field." Below the text is a "Typing Complete" button. To the right of the main form, the "Bubble Properties" and "Action Properties" panes are visible. The "Action Properties" pane shows the "String input" type, "Application: Oracle 11i", "Object type: Editfield", and "Object name: Alternate Name". The "Input text" field in this pane contains "ABCRS".

At the bottom of the screen, a sequence of colored circles (S, X, F, F, F, F, F, F, X, F, F, F, F, X, F, F, F, X, F, X, X, F, F) is displayed, likely representing a test script or a sequence of actions.

# UPK Deployment Deliverables

- Business Process Documents
- Test Scripts
- Training Guides
- Job Aids
- Four Modes of e-Learning – See It, Try It, Know It, Do It (UPK Player)



# UPK Deployment

- UPK Player content can easily be deployed to a web server or CD
- UPK Player content can be used for Oracle Help File Integration
- UPK Player content usage can be tracked

# UPK Help File Integration

The screenshot shows the Oracle Applications interface for creating a new purchase order. The window title is 'Purchase Orders - [New]'. The 'Operating Unit' is 'Vision Operations', 'Created' is '09-JAN-2008 14:25:05', and 'Type' is 'Standard Purchase Order'. Other fields include 'PO, Rev' (0), 'Supplier', 'Ship-To' (M1- Seattle Mfg), 'Buyer' (Smith, Jonathan), 'Site' (V1- New York City), 'Bill-To' (V1- New York City), 'Status' (Incomplete), 'P-Card', 'Contact', 'Currency' (USD), and 'Total' (0.00). A toolbar at the top contains various icons, with a question mark icon highlighted by a green box. A 'Do It!' pop-up window is overlaid on the bottom right, titled 'Enter a Standard Purchase Order', featuring a lightbulb icon and a right-pointing arrow. The Solbourne logo is visible in the bottom right corner of the application window.

Num	Type	Item	Rev	Job	Category	Description	UOM	Quantity	Price



# UPK Usage Tracking

- Allows organizations to measure user competency and user adoption of their organization's applications. Also used to identify areas in the application where users require additional training and support. (Included with the UPK Developer)

# UPK Usage Tracking

Usage Tracking - Windows Internet Explorer  
 http://intranet.solbourne.com/ods/tracking/reports/List.aspx

Report List **ORACLE**  
User Productivity Kit

[New Report](#) | [Import Report](#) | [Return to Main Page](#) | [Help](#)

Report Name	View	Design	Delete
<a href="#">Executive Summary</a>			
<a href="#">Sample - Content Usage Report</a>			
<a href="#">Sample - Know It Results</a>			
<a href="#">Sample - Topics Taken</a>			
<a href="#">Sample - User Report</a>			
<a href="#">usage_report</a>			

\*Your personal reports



# UPK Usage Tracking

Usage Tracking Report - Windows Internet Explorer

http://intranet.solbourne.com/ods/tracking/reports/templates/normal/Rpt.aspx?FromDesign=False

File Edit View Favorites Tools Help

Usage Tracking Report

**Sample - Content Usage Report** [Return to the report list](#) [Go to Report Design](#) [Help](#)

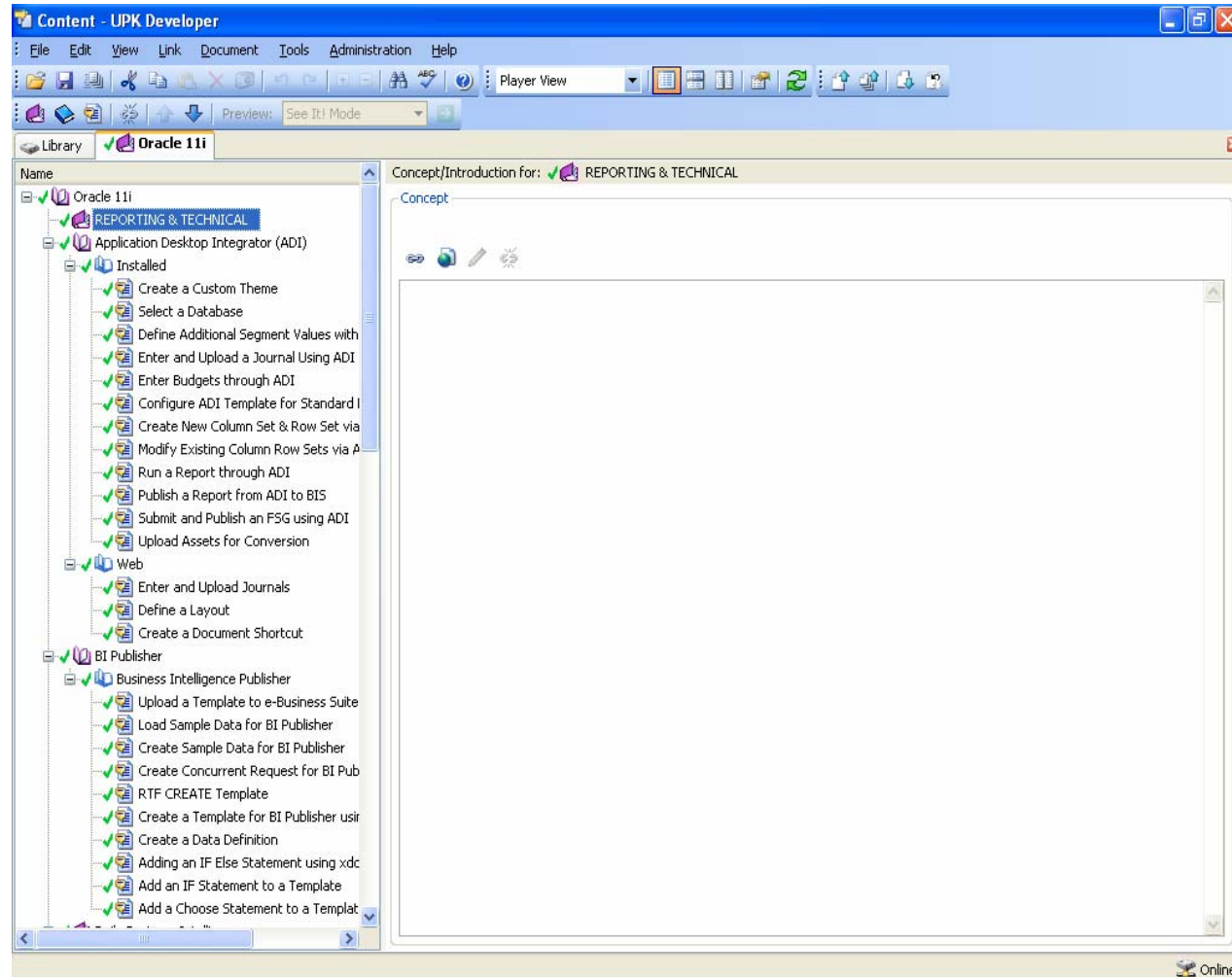
Date Range From 8/1/2007 To 1/1/2008

Application	Module	Lesson	Topic	Username	View Count
Oracle 11i					245
	Accounts Payable				8
		Pay for Goods and Services			8
			Define Invoice Batches		1
				HQ-NTjthomas	1
			Enter Basic Invoices		5
				HQ-NTbchrste	1
				HQ-NTsdavis	4
			Enter a Credit Memo		1
				HQ-NTsdavis	1
			Match Credit Memo to PO		1
				HQ-NTsdavis	1
	Accounts Receivable				4
		Process Manual Invoice			4
		Create Recurring Invoices			2
				HQ-NTsdavis	0





# UPK Recorded Content



## 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

**UPK Developer**  
Single Source Development and Customization

# UPK Upgrade to 3.1

- Content Management Features
- Rapid Re-Record and Translation Features for Upgrading or Globalizing existing UPK Developer Content



**Oracle** User  
Productivity Kit

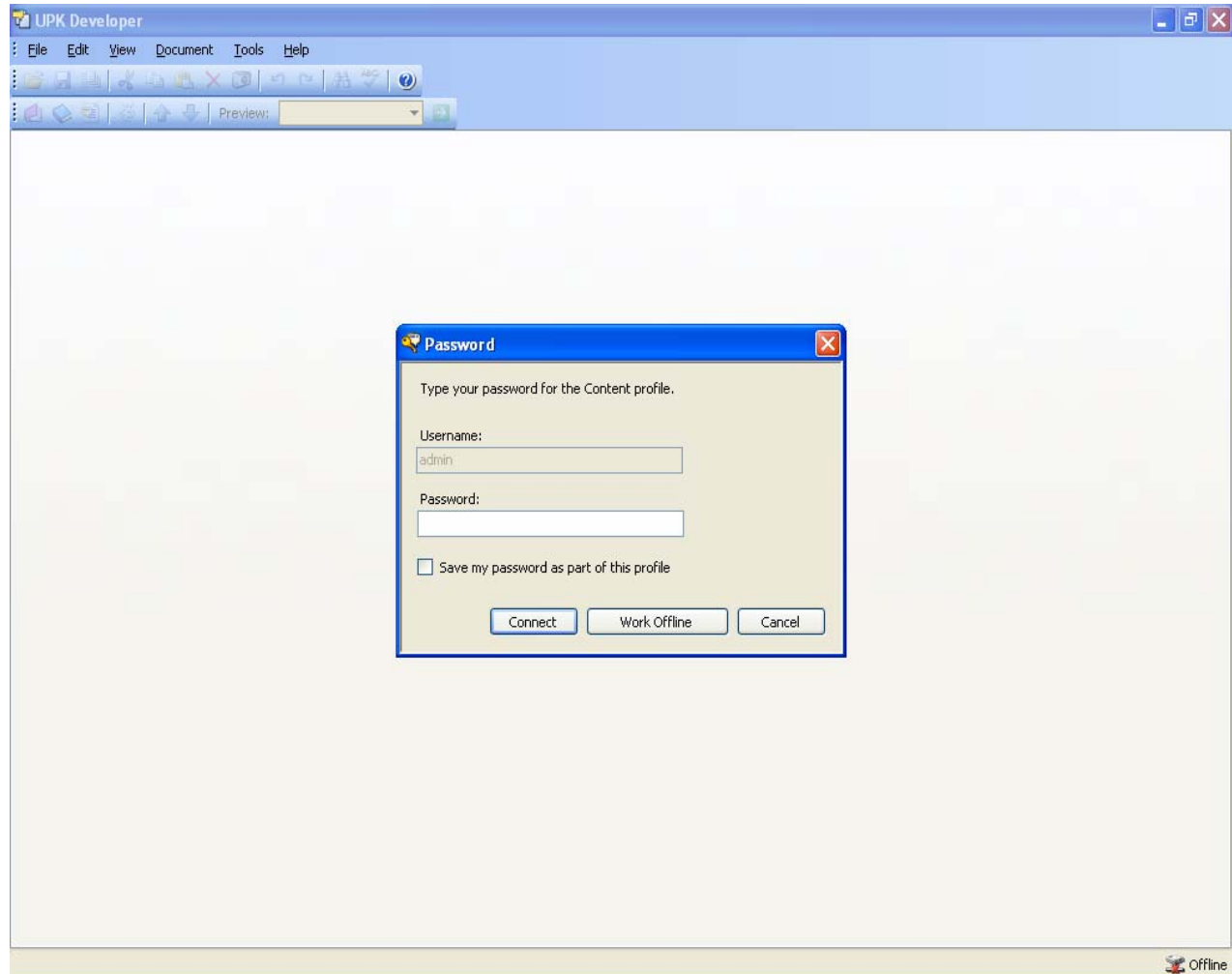


# UPK 3.1 Content Management

- Centralized Content Library
- Sign in, Check-in and Check-out Required
- Remote users can work online or offline
- Versioning, Restoring and Administrative Approval
- Learning Objects can be reused



# Login and Work Online or Offline

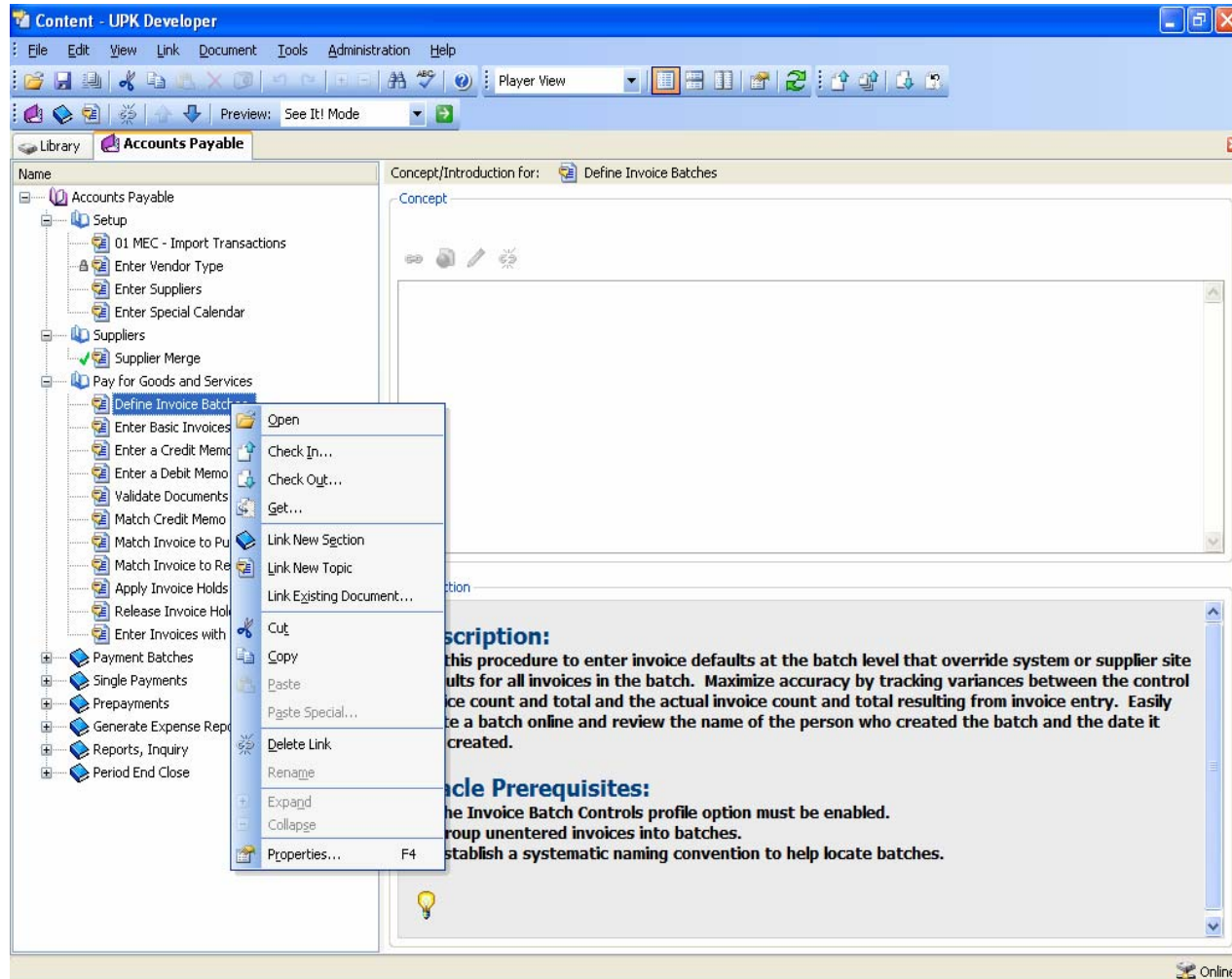


# Centralized Content Library

The screenshot displays the 'Content - UPK Developer' application window. The title bar reads 'Content - UPK Developer'. Below the title bar is a menu bar with 'File', 'Edit', 'View', 'Document', 'Tools', 'Administration', and 'Help'. A toolbar contains various icons for file operations. Below the toolbar is a 'Preview: See It! Mode' dropdown. The main workspace is titled 'Library' and shows 'Oracle 11i' selected. On the left, a 'Folders' pane shows a tree structure with 'Import' and 'Oracle 11i' as main categories. Under 'Oracle 11i', numerous sub-folders are listed, including 'Accounts Payable', 'Accounts Receivable', 'Advanced Benefits', 'Advanced Pricing', 'Advanced Supply Chain Planning', 'Application Desktop Integrator (ADI)', 'BI Publisher', 'Bills of Material', 'Budgeting', 'Cash Management', 'Cost Management', 'CUSTOMER RELATIONSHIP MANAGEMENT', 'Daily Business Intelligence', 'Discoverer', 'Employee Self Service', 'Engineering', 'Enterprise Asset Management', 'Fixed Assets', 'General Ledger', 'Grants Administration', 'HUMAN CAPITAL MANAGEMENT', 'Human Resources', 'Expenses', 'iLearning', and 'Internal Controls Manager'. The right pane shows a list of content items with columns for 'Name', 'Checked out by', 'Last modified date', 'Version', and 'Type'. The items include various Oracle 11i components like 'Accounts Payable', 'ACCT BAL INQ', 'ACCTNG TAB', 'ADD SUPP/INV', 'ADJ TAB INFO', 'AP TRIAL BAL', 'APPLY INV HOLD', 'Apply Invoice Holds', 'Apply Invoice Holds\_Concept', 'Apply Prepayments', 'AUTO NUMBERING', 'BANK ACC TAB', 'BATCH INFO', 'CALC MATCH FLD', 'CL OP AP PERIOD', 'CLASSIF TAB', 'CONTROL TAB', 'CURR TAB INFO', 'DATE NOTE', 'Define an Expense Report Template', 'Define Invoice Batches', 'DIST 1', 'DIST 2', 'DIST TYPES', 'EDI', 'EMP NAME/NUM', 'Enter a Basic Expense Report', 'Enter a Basic Expense Report\_Concept', 'Enter a Credit Memo', 'Enter a Debit Memo', 'Enter a Manual Payment', and 'Enter a Payment Batch'. The status bar at the bottom right indicates 'Online'.

Name	Checked out by	Last modified date	Version	Type
Accounts Payable	admin	1/7/2008 10:35:01 AM	New	Module
ACCT BAL INQ	admin	1/7/2008 10:32:54 AM	New	Web Page
ACCTNG TAB	admin	1/7/2008 10:32:54 AM	New	Web Page
ADD SUPP/INV	admin	1/7/2008 10:32:55 AM	New	Web Page
ADJ TAB INFO	admin	1/7/2008 10:32:55 AM	New	Web Page
AP TRIAL BAL	admin	1/7/2008 10:32:56 AM	New	Package
APPLY INV HOLD	admin	1/7/2008 10:32:56 AM	New	Package
Apply Invoice Holds	admin	1/7/2008 10:33:41 AM	New	Topic
Apply Invoice Holds_Concept	admin	1/7/2008 10:33:40 AM	New	Web Page
Apply Prepayments	admin	1/7/2008 10:33:43 AM	New	Topic
AUTO NUMBERING	admin	1/7/2008 10:32:56 AM	New	Web Page
BANK ACC TAB	admin	1/7/2008 10:32:57 AM	New	Web Page
BATCH INFO	admin	1/7/2008 10:32:57 AM	New	Web Page
CALC MATCH FLD	admin	1/7/2008 10:32:58 AM	New	Web Page
CL OP AP PERIOD	admin	1/7/2008 10:32:58 AM	New	Package
CLASSIF TAB	admin	1/7/2008 10:32:59 AM	New	Web Page
CONTROL TAB	admin	1/7/2008 10:32:59 AM	New	Web Page
CURR TAB INFO	admin	1/7/2008 10:33:00 AM	New	Web Page
DATE NOTE	admin	1/7/2008 10:33:01 AM	New	Web Page
Define an Expense Report Template	admin	1/7/2008 10:33:45 AM	New	Topic
Define Invoice Batches	admin	1/7/2008 10:33:46 AM	New	Topic
DIST 1	admin	1/7/2008 10:33:01 AM	New	Web Page
DIST 2	admin	1/7/2008 10:33:02 AM	New	Web Page
DIST TYPES	admin	1/7/2008 10:33:02 AM	New	Web Page
EDI	admin	1/7/2008 10:33:03 AM	New	Web Page
EMP NAME/NUM	admin	1/7/2008 10:33:03 AM	New	Web Page
Enter a Basic Expense Report	admin	1/7/2008 10:33:49 AM	New	Topic
Enter a Basic Expense Report_Concept	admin	1/7/2008 10:33:47 AM	New	Web Page
Enter a Credit Memo	admin	1/7/2008 10:33:53 AM	New	Topic
Enter a Debit Memo	admin	1/7/2008 10:33:56 AM	New	Topic
Enter a Manual Payment	admin	1/7/2008 10:33:59 AM	New	Topic
Enter a Payment Batch	admin	1/7/2008 10:34:02 AM	New	Topic

# Check In – Check Out



# Versioning and Comments

The screenshot displays the Oracle Content Manager interface. A 'History of "Setup"' dialog box is open, showing a table of document versions. The table has columns for Version, User, Created, and Comments. The first row shows version 2 created by 'admin' on 1/9/2008 at 8:39:02 AM. The second row shows version 1 created by 'admin' on 12/19/2007 at 8:26:44 AM with the comment 'Note the description needs review'. Below the table are 'Rollback', 'View', and 'Close' buttons.

Version	User	Created	Comments
2	admin	1/9/2008 8:39:02 AM	
1	admin	12/19/2007 8:26:44 ...	Note the description needs review

The background window shows a library of folders including 'UPK 3.1 Training Files', 'Accounts Payable', 'Accounts Receivable', and 'Oracle 11i'. A list of documents is visible, including 'Single Payments', 'SUPP ENTFLOW', 'Supplier Merge', 'Suppliers', 'TABBED REGIONS', 'TAX REPORTING T', 'Transfer AP to GL', 'TRIAL BAL PARAM', 'TRSF TO GL', 'TRSF TO GL\_Concept', 'TXFR AP TO GL', 'TYPE', 'Validate Documents', 'Validate Documents\_Concept', 'View Accounting Lines', 'VIEW PAYM TAB', 'VIEW PREPAY TAB', 'Void a Payment', and 'WITHHOLDING TAB'.



# Approval and Workflow

The screenshot shows the Oracle Content Manager (UPK Developer) interface. The main window displays a library of documents under the 'Oracle 11i' folder. The 'Properties' window is open, showing details for a document named '01 MEC - Import Transactions'.

**Library View:**

Name	Checked out by
01 MEC - Import Transactions	admin
01 MEC - Import Transactions_Concept	admin
02 MEC - Transfer Accounts Receivable to the G...	
02 MEC - Transfer Accounts Receivable to the G...	
03 MEC - Post Accounts Receivable in the Gener...	
03 MEC - Post Accounts Receivable in the Gener...	
04 MEC - Run Aging Reports	
05 MEC - Run the AR Reconciliation Report	
06 MEC - Run a Transaction Register	
07 MEC - Run a Receipt Register	
08 MEC - Run an Adjustment Register	
09 MEC - Reconcile Receivables Activity	
10 MEC - Inquire on Account Balances	
11 MEC - Reconcile Receivables to General Ledger	
12 MEC - Open and Close Accounting Periods	
12 MEC - Open and Close Accounting Periods_Co...	
Accounts Receivable	
Accounts Receivable Dunning	
Add an Address	
ADDL INV INFO	
Adjust a Customer Transaction	
Apply Deposits to Invoices	
Apply On-Account Credit	
Approve an AR Adjustment	
Approve an AR Adjustment_Concept	
APPROVE_ADJUST	
AR Inquiry	
AR Period Close	
AR Reports	
AR TRANSACTION	
BALANCEDUE	
BILL/REC HIS FL	

**Properties View:**

Property	Value
<b>Business Process Document</b>	
Additional Information	
BPD Revision	
Department	AR
Last changed by	Tinker Bell
Output	
Required fields	
Status	
Trigger	Transaction received via fax
<b>General</b>	
Glossary	
Language	English (United States)
Name	01 MEC - Import Transactions
Resolution	1024 x 768
Template	Default
<b>Instructor Manual</b>	
Instructor notes	
<b>Job Aid</b>	
Job Aid Revision	
<b>Test Document</b>	
<b>Topic</b>	
Keywords	
Know It Remediation	Level 1, Level 2, Level 3
Know It Required %	70%
Play Modes	See It, Try It, Know It, Do It
Roles	Admin
<b>Workflow</b>	
Assigned to	jsoisson
State	In Review
<b>State</b>	

# UPK 3.1 Exercise

- Objectives
  - Record UPK 3.1 Content
  - Manage UPK 3.1 Content
  - Build a UPK 3.1 Content Outline
  - Publish UPK 3.1 Content



# Questions & Answers



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