

Comprehensive Business Process Documentation & Training Using Tutor & UPK

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Agenda

- Today's Business Environment – The Importance of Business Process Documentation
- Today's Training Environment – The Importance of Speed and Adaptation to Diverse Learners
- The Tutor Solution
- The UPK Solution
- Using Tutor & UPK to achieve Comprehensive Documentation & Training



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



Today's Business Environment

- Increased regulation around business process documentation
 - Required monitoring of and reporting on internal controls and financial reporting practices
- Challenges:
 - Organizations initially relied on manual systems for control tracking
 - There may be different IT systems making data gathering difficult
 - Requires a large investment in time and human resources



Today's Training Environment

- Increased need for speed & flexibility.
 - Technology is constantly changing
 - Training materials must be developed quickly
 - Training must be adaptable to diverse learner needs
- Challenges
 - Companies are Geographically dispersed
 - Learners are diverse
 - Multigenerational
 - Multicultural
 - Technological
 - Training is necessary and time is limited



What is Oracle Tutor?

- A system for creating and maintaining process documentation.
 - Process documentation refers to documenting entire business processes, not just creating training documents for Oracle applications.
 - Process documentation is the first step of compliance with the new corporate governance regulations (e.g., Sarbanes-Oxley Act).



Tutor provides a Solution by:

- Streamlining the monitoring of and reporting on internal controls by creating and maintaining process documentation
- Allowing easy auditing of process documentation to ensure accuracy and effectiveness
- Distributing process documentation to employees on a need-to-know-basis
- Integrating Process Documentation with Oracle Application courseware
- Building customized Oracle reference materials based on job title or topic



Tutor Components

Oracle Tutor is comprised of three components:

1. Documentation **methodology** defines all aspects of the documentation process:
 - Formatting, creation, content, distribution, and maintenance of documents
2. **Model documents** are complete documents that provide a starting point.
 - Document owners can edit the models instead of creating documents from scratch.
3. **Software** tools create, update, and distribute the documents.
 - Author is the tool used to create and edit documents
 - Publisher is the tool used to ensure document integrity, and build manuals and guides.



Tutor Deployment

- Documentation
- Online Manuals
- Flow Charts

Desk Manual: Accounts Payable Supervisor

Quick link

- [!\[\]\(cf5be311f7b2821912d8009884508fa2_img.jpg\) 1099 Processing](#)
- [!\[\]\(9804e70d96ff9fe9899b264c06a33cd7_img.jpg\) Accounts Payable - Bank Accounts](#)
- [!\[\]\(4f49380f3d6bce047bc47b2072cc076f_img.jpg\) Accounts Payable - Default Accounts](#)
- [!\[\]\(73944fd4f6fb83e4c64013731d1820cc_img.jpg\) Accounts Payable - VAT Designations](#)
- [!\[\]\(d8f7165d5a8d1eba426ea452457190e5_img.jpg\) Accounts Payable Period End Close](#)
- [!\[\]\(f608c4821f4fa8f3141b1baf96fa88f9_img.jpg\) Accounts Payable Period End Reconciliation](#)
- [!\[\]\(ecaac2a7ce9fc9f5de2e0b330d2ae13c_img.jpg\) Adding Suppliers](#)
- [!\[\]\(f9b536c6b3afa5ea31dceef88a94e509_img.jpg\) Changing Supplier Data](#)
- [!\[\]\(d6dd49217bf3ceede8ee3a91c4ef7927_img.jpg\) Computer-Generated Payment Batches](#)
- [!\[\]\(fca66e4dcc57d71aae53b43a17649d9d_img.jpg\) Creating Single Payments](#)

[Accounts Payable Reconciliation](#)
[Accounts Payable Referral](#)
[Check Request](#)

[Close Schedule](#)
[Journal Entry Responsibility Table](#)
[Narrative Account Descriptions](#)

Procedures

- [!\[\]\(97faa0168e491544be255cfcab218e9b_img.jpg\) Entering Recurring Invoices](#)
- [!\[\]\(b2166b76608b8499cffc130bf1b1fe60_img.jpg\) Establishing the Close Schedule](#)
- [!\[\]\(b29da0f81af7d31816596405aed0e378_img.jpg\) General Ledger Period End Close - Adjustments](#)
- [!\[\]\(52b4a21f1e75ded8f9710f4114e70d28_img.jpg\) Maintaining the Standard Journal Entry Log](#)
- [!\[\]\(07221912d1bf206beb97cefd77af5f78_img.jpg\) Monitoring the Close and Avoiding Delays](#)
- [!\[\]\(c91d9fd9eb37f21f63405f290fd824c2_img.jpg\) Processing Manual Checks](#)
- [!\[\]\(14a82b1cdd6b1489ba04a4334bdc8552_img.jpg\) Processing Manual Journal Entries](#)
- [!\[\]\(d7e57fae97bcb08f452f04012143cb4c_img.jpg\) Processing Subledger Data to the General Ledger](#)
- [!\[\]\(4b6a3d6d2e338eb31753f2fba4f530b7_img.jpg\) Resolving Invoice Holds](#)
- [!\[\]\(0e8e4d9fd03131fa68d8d2236d864a04_img.jpg\) Updating Financial Statement Formats](#)

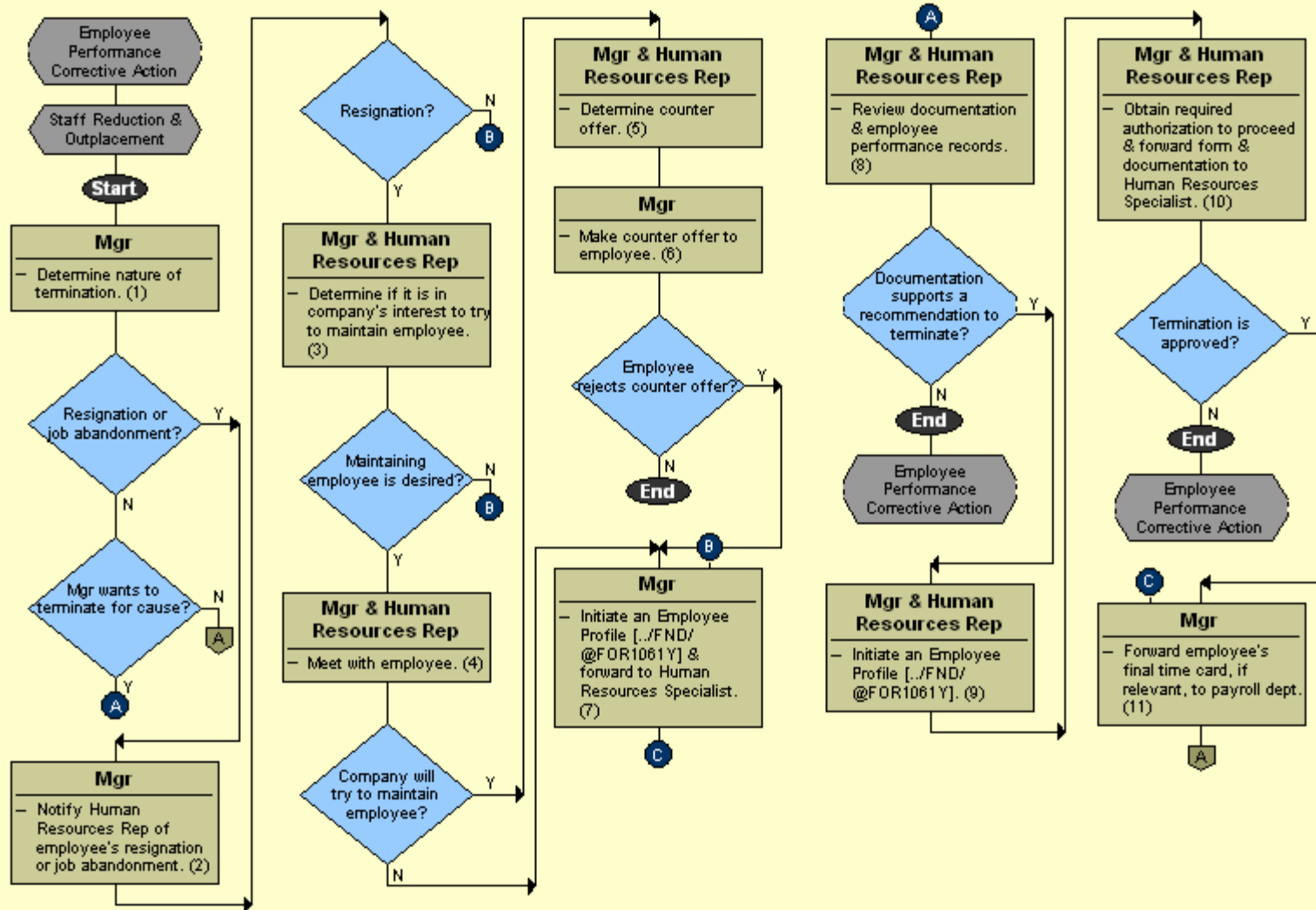
Business Forms

[Journal Entry](#)
[Supplier Maintenance](#)

Reference Documents

[Payment Request Distribution Table](#)
[Supplier Update Authorization Table](#)

Employee Termination



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

The UPK Solution

Oracle's User Productivity Kit ...

... provides a variety of training options based on a single-source recording of an Oracle task.



UPK Developer Recording

The screenshot shows the Oracle Applications Payables interface. A 'Recorder - New Topic' dialog box is overlaid on the top right, with the text: 'Press PrintScreen to begin recording.', 'Next screenshot records: Start Screen', and 'Last recorded event:'. Below the dialog is a 'Finish' button. The main window title is 'Oracle Applications' and the menu bar includes 'File', 'Edit', 'View', 'Folder', 'Tools', 'Window', and 'Help'. The toolbar contains various icons for navigation and actions. The main content area is titled 'Payments (Payables, Vision Operations (USA))' and contains 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'. Below this table is another table with columns: Number, Date, Amount, GL Date, and Payment Amount. The first row in this table is also highlighted. At the bottom of the interface, there is a 'Description' field, an 'Invoice Overview' button, an 'Accounting Unprocessed' button, and a row of buttons: 'Actions... 1', 'Enter/Adjust Invoices', and 'Payment Overview'. The status bar at the very bottom shows 'Record: 1/1' and '<OSC>'.

UPK Developer Editing

The screenshot displays the UPK Developer interface for Oracle 11i, specifically the 'Create Customers' window. The main window is titled 'Oracle Applications - Vision(8017)' and shows a form for creating a customer. The 'Customer Type' is set to 'Organization' and the 'Name' is 'ABC Rental Services'. The 'Alternate Name' field is highlighted in red, and a yellow tooltip with the text 'Try It! Enter an alternate name for the customer. Type ABCRS in the ALTERNATE NAME field. Typing Complete' is overlaid on it. The 'Bubble Properties' panel on the right shows the 'String input' type and the 'Input text' set to 'ABCRS'. The 'Action Properties' panel shows the 'Object type' as 'Editfield' and the 'Object name' as 'Alternate Name'. The 'Input text' field in the 'Action Properties' panel is also set to 'ABCRS'. The 'Bubble Properties' panel also shows the text 'The alternate name for the customer is ABCRS. Enter that value in the'.



UPK Training Output

- 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 Training 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 displays the Oracle Applications interface for creating a new Purchase Order. The window title is "Oracle Applications" and the menu bar includes "File", "Edit", "View", "Folder", "Tools", "Inquire", "Actions", "Window", and "Help". The toolbar contains various icons, with a question mark icon highlighted by a green box. The main form is titled "Purchase Orders - [New]" and contains the following fields:

- Operating Unit: **Vision Operations**
- Created: **09-JAN-2008 14:25:05**
- PO, Rev: **0**
- Type: **Standard Purchase Order**
- Supplier: [Empty]
- Site: [Empty]
- Ship-To: **M1- Seattle Mfg**
- Bill-To: **V1- New York City**
- P-Card: [Empty]
- Contact: [Empty]
- Buyer: **Smith, Jonathan**
- Status: **Incomplete**
- Currency: **USD**
- Total: **0.00**
- Description: [Empty]

Below the form are tabs for "Lines", "Price Reference", "Reference Documents", "More", "Agreement", and "Temporary Labor". A table with columns "Num", "Type", "Item", "Rev", "Job", "Category", "Description", "UOM", "Quantity", and "Price" is visible. An "Item" field and buttons for "Catalog...", "Currency...", and "Terms" are at the bottom. A status bar shows "Record: 1/1" and "<OSC>".

An overlaid window titled "Do It!" with the subtitle "Enter a Standard Purchase Order" is shown. It features a lightbulb icon and a play button. The Solbourne logo is prominently displayed at the bottom of this window.



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
Executive Summary			
Sample - Content Usage Report			
Sample - Know It Results			
Sample - Topics Taken			
Sample - User Report			
usage_report			

*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

[Return to the report list](#) [Go to Report Design Help](#)

Sample - Content Usage Report

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



Advanced UPK Tools for Rapid Content Development

- Guided Re-record
- Translation & Localization
- Publishing Styles
- Content Management



Guided Re-record

The screenshot displays the Oracle Applications interface with a 'Payment Types' dialog box open. The dialog box has a search field and a list of payment types: Manual, Quick, and Refund. The 'Manual' option is selected. A 'Re-recorder' overlay window is positioned in the top right, providing instructions for recording the action. The overlay window contains the following text:

Re-recorder - Enter a Manual Payment
Press PrintScreen to record.
 Next screenshot records: Left click on Pushbutton <OK>
 Last recorded event: Left click on Pushbutton <Type>

Below the instructions is a 'Preview of Original' section showing a 'Finish' button and a yellow callout box with the text: 'Accept the default selection of MANUAL. Click on OK to accept the default selection of MANUAL. Select a payment type.' The 'OK' button in the dialog box is highlighted with a red box.

The background interface shows a table with columns: Type, Operating Unit, Trading Partner, Supplier Number. The 'Quick' row is highlighted. Below the table is a 'Payment Types' dialog box with a search field and a list of payment types: Manual, Quick, Refund. The 'Manual' option is selected. At the bottom of the dialog box are buttons: Find, OK, Cancel.

At the bottom of the main window, there is a 'Description' field, an 'Invoice Overview' button, and an 'Accounting Unprocessed' button. At the very bottom, there are buttons for 'Actions... 1', 'Enter/Adjust Invoices', and 'Payment Overview'. The status bar at the bottom shows 'Choices in list: 3' and 'Record: 1/1'.

UPK Language Templates

- UPK template text is automatically generated by the developer when recording
- By default UPK includes 14 language templates for automatic translation of template text
- Custom language templates can be created and saved

UPK Localization

- Localization - Export and Import Custom text with Localization Interchange File Format (XLIFF) or Word
- Language templates and custom publishing styles provide quick translation and customization to UPK template text

UPK Localization Process

- Create a duplicate of all documents to translate
- Re-record topics to capture screenshots & object names in the target language
- Export text in Word or XLIFF format
- Translate external content and custom text
- Import text

UPK Publishing Styles

- Publishing styles can be customized and saved in UPK.
- Publishing styles allow for saved templates (logos and formatting) for quick publishing in custom styles and languages.

UPK 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



Using Tutor & UPK

- Comprehensive Documentation & Training
- Tutor captures high-level business processes & flows while UPK provides a variety of task training options
- Efficiencies in documentation. What is captured in tutor can be leveraged in UPK
- Meets needs of internal and external audiences



Suggested Tutor and UPK integration models:

- Tutor online documents and manuals link to UPK task simulations
- UPK task simulations include Tutor flowcharts in the concept pane
- UPK task simulations include links to Tutor manuals

Questions & Answers



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