

Comprehensive Business Process Documentation and Training Using Tutor and UPK

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Overview

When used together, Oracle Tutor and Oracle UPK are complimentary business process documentation and training tools. While the multi-faceted UPK tool allows for quickly recording system tasks to produce documentation and dynamic training, Tutor allows for high level business processes authoring using the Tutor methodology and model document system.

Introduction

The Business Environment Today – A Critical Need for Business Process Documentation

Businesses today work in an environment of increased regulation. The Sarbanes-Oxley Act of 2002 has required that publicly listed companies implement strong monitoring of and reporting on internal controls. This intensification of financial reporting requirements has proven to be a great challenge. Many companies initially relied on manual systems for control tracking. Many companies have found that reporting from, and with, many different IT systems makes data gathering difficult. The effort requires a large investment in time and human resources.

Privately-held companies, whose compliance is not always required, may have stakeholders (external board members, insurance carriers, private equity concerns, etc.) who expect similar internal controls. In all cases, it is good practice to document processes to maintain efficiency and communicate expectations within an organization.

Finding efficiencies in process documentation, as well as consistent communication and benchmarks entity-wide is a challenge in today's environment.

The Training Environment Today – An Increasing Need for Speed and Flexibility

Technological advancements continue to change the training landscape. Software and architecture updates are frequent and users require constant retraining. An internal training program must have the ability to adapt quickly to frequent change.

Technology has also provided the ability for users to “learn on demand” in ways that meet the increasing complex needs and schedules of users. Users are now receiving training when and where they need it: in computer labs, online and on mobile devices.

Training has been identified as one of the critical success factors when implementing an ERP system. Untrained or poorly trained users are costly and will provide a drain on financial resources and moral. The accelerating pace of business does not allow for training delays. Timing is critical to today’s learners and will ensure that highest return on an ERP investment.

Diversity in trainees is and will continue to be a training challenge. Users of ERP systems will be multigenerational, multicultural and technologically diverse. Therefore, companies need a training solution that will meet the needs of all types of learners.

Being able to quickly create or update training material that can be used in multiple delivery methods is essential for business today.

Solutions

The Tutor Solution

Financial reporting compliance should become a process, not a project with an ending. Bringing processes under Tutor’s single source system reduces the time and effort required for compliance, and increases efficiencies.

But regulatory compliance is only part of the story. A great deal of data is retrieved when processes are so closely monitored and tracked. This provides a great opportunity for improvement and could be a potential competitive advantage.

This data can be used to not just track but improve business processes by increasing efficiencies and reducing risk in these ways:

- Extending internal control improvements to operational and other non-financial risk areas.
- Expanding the scope to include the review of process and controls to find areas for improvement.
- Providing more sound and complete user training.
- Making available more comprehensive user support which increases efficiencies in the workplace by reducing errors and time requirements.

Oracle Tutor is a single-source system for creating and maintaining business process documentation. It allows companies to:

- Streamline the monitoring of and reporting on internal controls by creating and maintaining process documentation
- Easily audit process documentation to ensure accuracy and effectiveness
- Distribute process documentation to employees on a need-to-know-basis
- Integrate Process Documentation with Oracle Application courseware
- Build customized Oracle training materials based on job title or topic
- Customize Oracle Applications Help

Tutor is comprised of three components:

1. The Methodology defines all aspects of the documentation process including resources, approach, format, content and integration.
2. The Model documents provide a starting point for process owners.
3. The Software tools create, update, and distribute the documents.
 - a. Author, based on MS Word, is the tool used to create and edit the documents.
 - b. Publisher is the tool used to ensure document integrity, and build and distribute both manuals and guides electronically or in print.

Tutor allows business process owners to maintain their business process documents using a single source tool. Documents can be published “on demand” by job role as well as by process. Standards can be developed and maintained, making the knowledge and communication of business practices more consistent. Standardized process documents make errors and risks easier to detect. Tutor is superior at capturing and automatically creating high level business process documentation and corresponding flow charts.

The UPK Solution

Oracle’s User Productivity Kit allows for rapid documentation and training content development by “recording” a system task in an Oracle application. The recorded UPK content is stored in a single-source content library and can be exported in a variety of end-user training formats including:

- Business Process Documents
- Training Guides
- Job Aids
- Test Scripts
- 4 Modes of eLearning Player Simulations (See It!, Try It!, Do It! and Know It?)

UPK efficiently facilitates the creation of a variety of training delivery options. For example, a trainer can select topics from the UPK topic library and print an on-demand training guide for classroom training the following week. The same source content in the UPK topic library can also be deployed as an eLearning training simulation for users that are remote and cannot attend the classroom training. A job aid can be created from the source content that users can take with them after training to use as a reference.

Additionally, UPK eLearning Player simulations can be integrated into the live ERP system help files which provides training to learners at the most ideal moment, when it is needed and relevant.

The UPK tool contains additional advanced features that promote efficient content development:

- UPK comes with several language templates that allow for automatic translation of automatically generated UPK template text.
- UPK supports Localization using Interchange File Format (XLIFF) or Word.
- UPK includes a Guided Re-Record feature that allows for rapid updates of existing training screenshots while keeping core language and process flow intact. This feature is especially useful when upgrading or capturing screenshots in other languages.

UPK contains a robust content management system that allows multiple developers to leverage an existing content library. Library content can be re-used and versioned, and workflow can be assigned. Content state can be noted and developers can work online or offline.

User Productivity Kit is a content development and management system that assists in the rapid creation of a variety of training options. UPK is superior at capturing system task level processes and translating that into diverse training and documentation materials.

Using both Tutor and UPK for Comprehensive Training and Documentation

Creating documentation and training with Tutor and UPK provides coverage of both high level-business process flows (Tutor) and in depth training materials for system level processes (UPK). This comprehensive approach will manage and distribute high-level process reporting and flow charts that can facilitate the communication of expectations across the organization while allowing for efficient “on demand” links to eLearning simulations for quick reference or training. This approach can seamlessly provide complete information to users when and where they need it for reference and provide up to date regulatory and reporting information to administrators.

Suggested Tutor and UPK integration models:

1. Tutor online documents and manuals link to UPK task simulations
2. UPK task simulations include Tutor flowcharts in the concept pane
3. UPK task simulations include links to Tutor online manuals

Conclusion

Oracle Tutor and Oracle UPK offer complimentary training and documentation solutions. Tutor is superior at capturing and organization the high-level business process flows and UPK is superior at creating rapid training content options at the system task level. The

single source content management features built into each tool make it easy to provide up to date information to end users when and where they need it.



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