

ORACLE®



ORACLE®

Productive Day ONE



Stuart Dunsmore
Sr. Director UPK & Tutor
Applications Development




ORACLE®

Productive Day ONE

Improve User Productivity at Go-Live with

Tutor & UPK: Oracle's End User Documentation & Productivity Tools

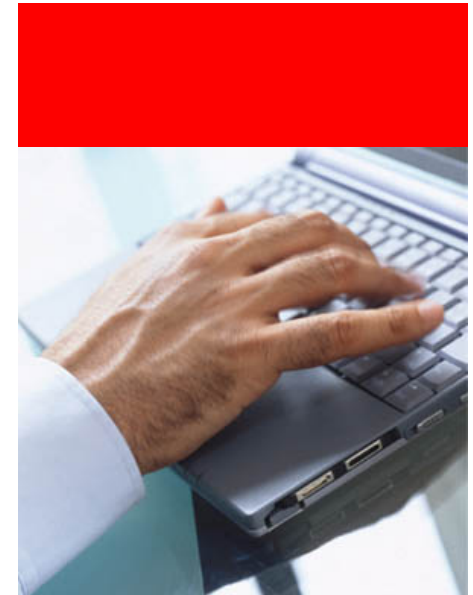




The following is intended to outline our general product direction. It is intended for information purposes only, and may not be incorporated into any contract. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions. The development, release, and timing of any features or functionality described for Oracle's products remains at the sole discretion of Oracle.

Agenda

- Why Implement?
- User Documentation
- Tools
- Model Content
- Proven Method
- **Day ONE Productivity**



Applications Implementation Objectives

- Automate Key Processes
- Implementing New Functionality
- Improve Flexibility
- Improve Response Time
- Gain Competitive Edge
- Improve Management Reporting
- Optimize Business Performance
- ***Increase Productivity***



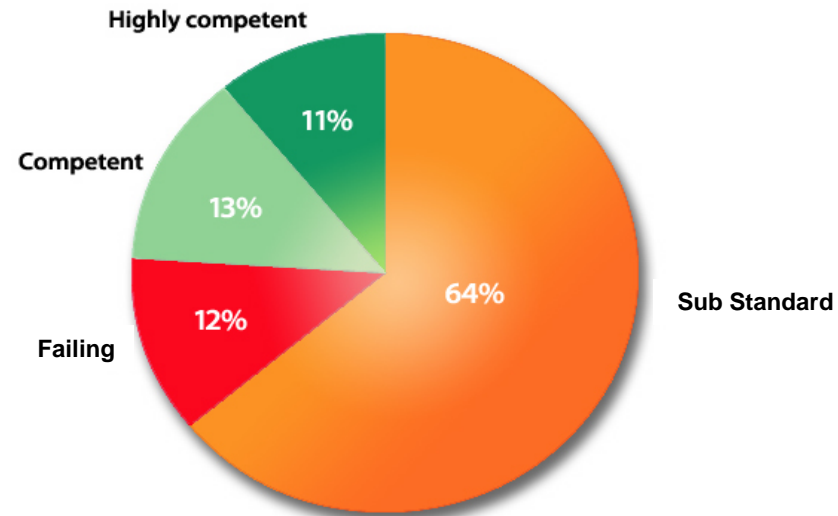
Key Employee Question:

“How do I do my job using these new Applications?”

Importance of Training Users

Gartner Studies

Survey of 437 companies
76% of users substandard



Reduce Support Cost

- Trained users require 3 to 6 times less support

Increased Productivity

- Trained users are 5 times more productive



User Documentation

**Describes what employees need to know
to achieve expected results**

Effective User Documentation:

- Is easy to create and maintain
- Has a standard format across the organization
- Reflects the approved model: current or future state
- Is distributed to all affected employees
- Is easy to consume
- Meets Audit compliance requirements

Oracle's User Documentation Solution

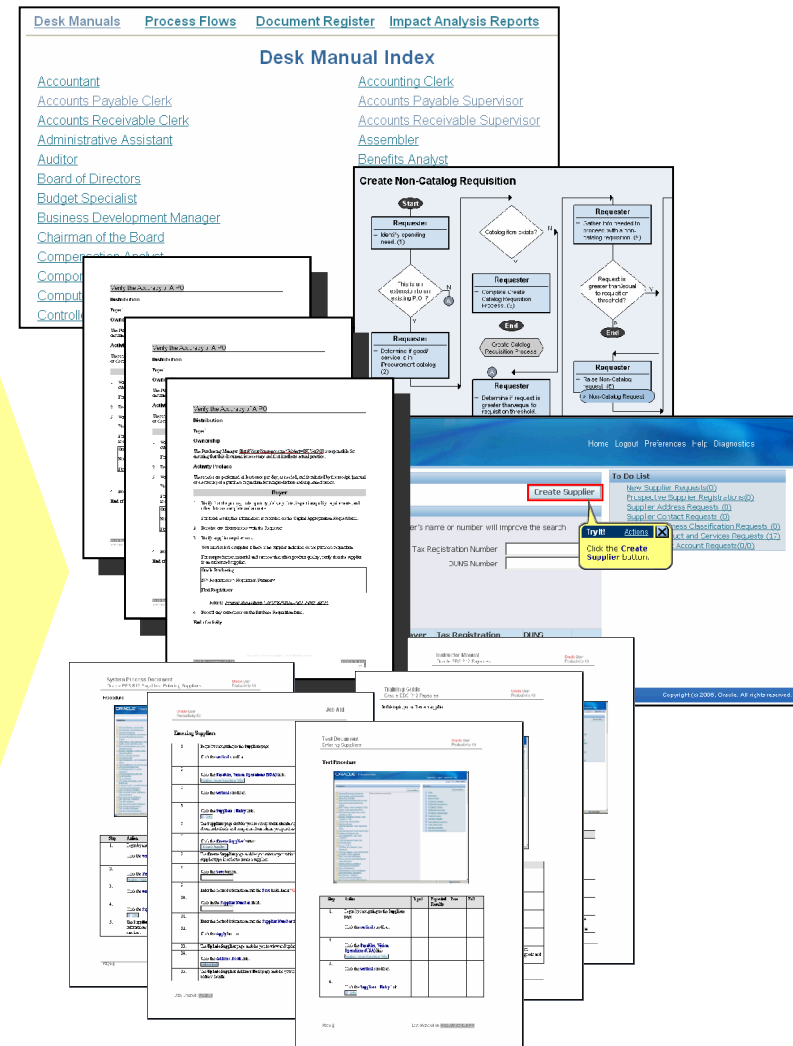
Oracle Tutor and UPK

Software Tools

Model Content

Proven Method

Customized
Documentation
For Your
Organization



ORACLE®



Software Tools

Tutor

- Flows and Procedures defining where Applications support the business process
- Role based Desk Manuals with procedures linked to UPK transaction simulations

People to People

User Productivity Kit

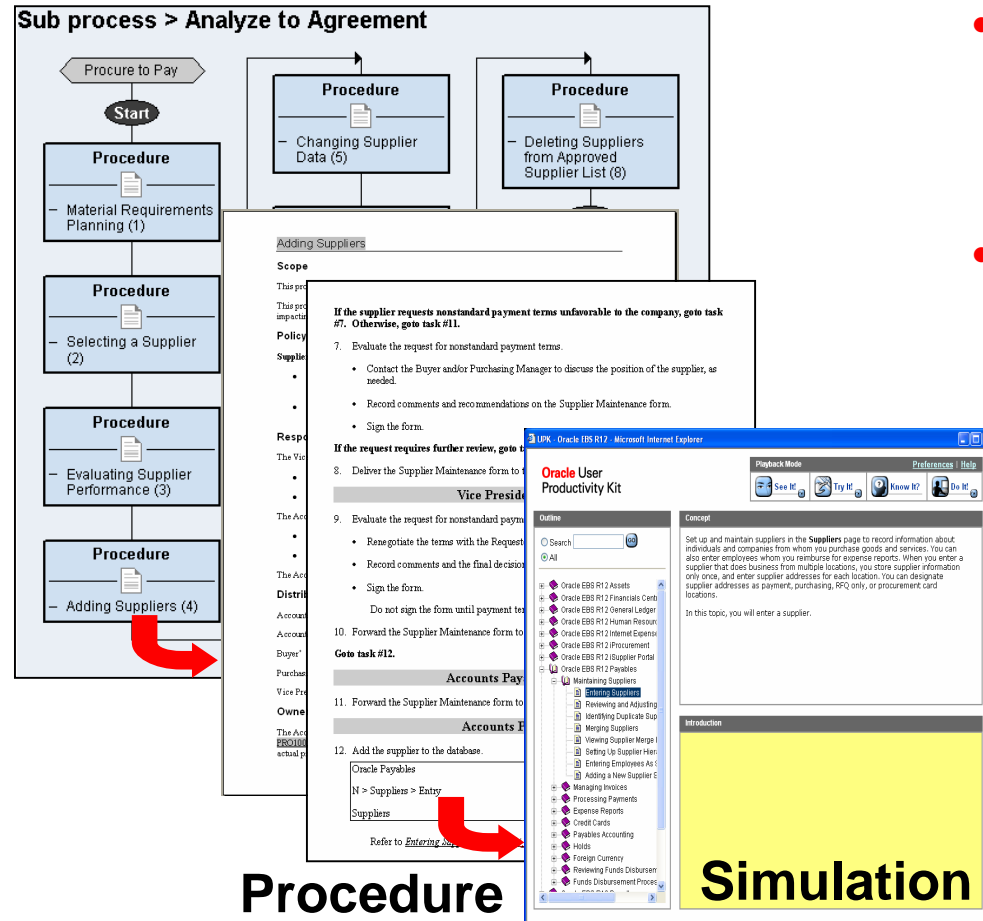
- Online and paper based system documentation
- Pre & post go live applications training
- In-application performance support

People to System

Model Content

Oracle's Process Documentation Hierarchy

Business Flow



Procedure & Simulation Starter Kits

- Hundreds of baseline flows and procedures
 - E-Business Suite
 - Generic - for any application
- Hundreds of baseline simulations
 - E-Business Suite
 - PeopleSoft Enterprise
 - JD Edwards EnterpriseOne

Multiple Functional Areas

- Financials
- Procurement
- HR
- Order Management
- Inventory
- Manufacturing
- Project Management

Many Ways to Access Content

[Desk Manuals](#) [Process Flows](#) [Document Register](#) [Impact Analysis Reports](#)

Desk Manual Index

- [Accounting Clerk](#)
- [Accounts Payable Supervisor](#)
- [Accounts Receivable Supervisor](#)
- [Assembler](#)
- [Benefits Analyst](#)
- [Budget Manager](#)
- [Business Analyst](#)
- [Buyer](#)
- [COBRA Plan Participant](#)
- [Compensation Manager](#)
- [Component Engineering Manager](#)
- [Contract Administrator](#)
- [Cost Accountant](#)

Desk Manual: Accounts Payable Supervisor

Quick link

Procedures

- [1099 Processing](#)
- [Accounts Payable - Bank Accounts](#)
- [Accounts Payable - Default Accounts](#)
- [Accounts Payable - VAT Designations](#)
- [Accounts Payable Period End Close](#)
- [Accounts Payable Period End Reconciliation](#)
- [Adding Suppliers](#)
- [Changing Supplier Data](#)
- [Computer-Generated Payment Batches](#)
- [Creating Single Payments](#)
- [Entering Recurring Invoices](#)
- [Establishing the Close Schedule](#)
- [General Ledger Period End Close - Adjustments](#)
- [Maintaining the Standard Journal Entry Log](#)
- [Monitoring the Close and Avoiding Delays](#)
- [Processing Manual Checks](#)
- [Processing Manual Journal Entries](#)
- [Processing Subledger Data to the General Ledger](#)
- [Resolving Invoice Holds](#)
- [Updating Financial Statement Formats](#)

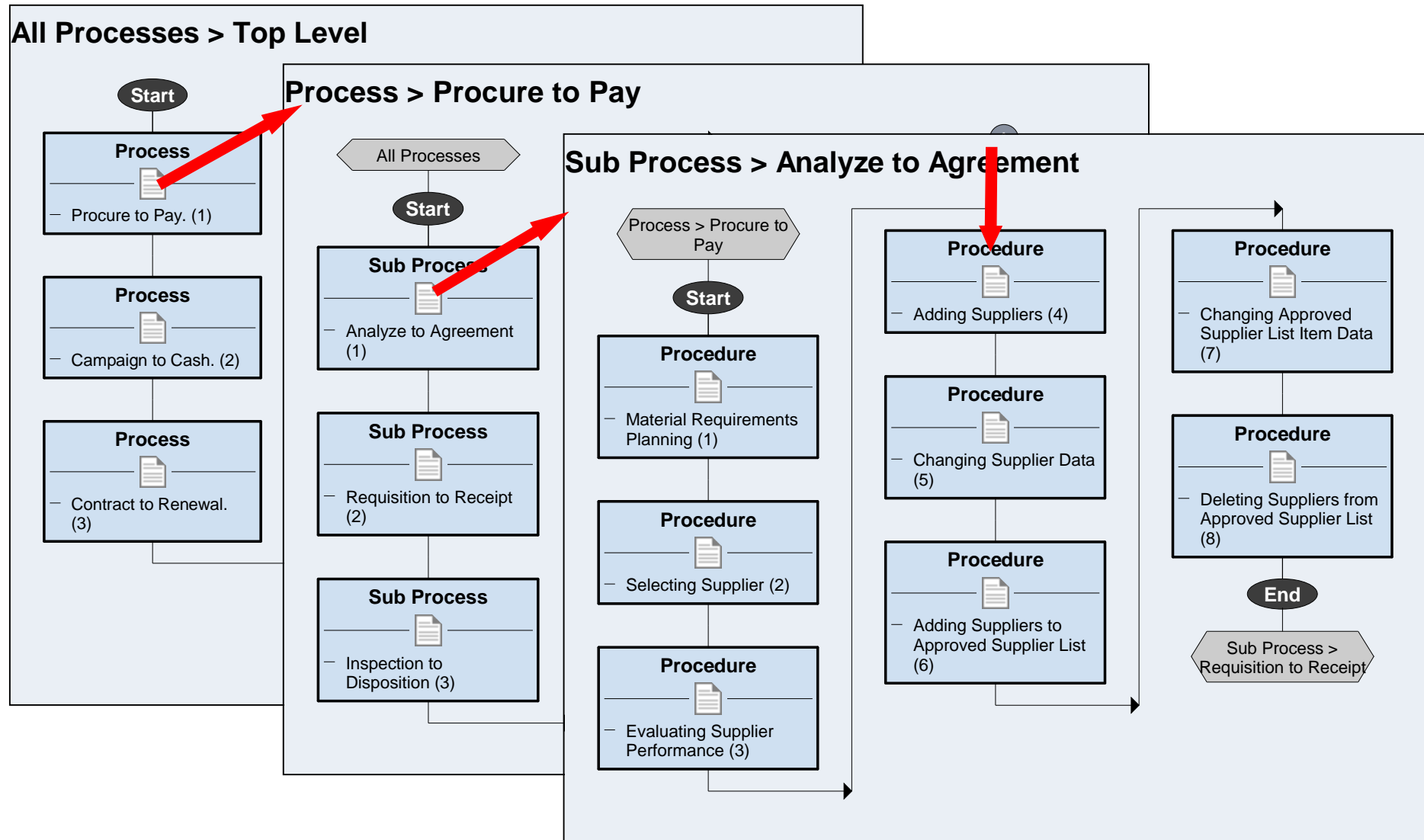
Business Forms

- [Accounts Payable Reconciliation](#)
- [Accounts Payable Referral](#)
- [Check Request](#)
- [Journal Entry](#)
- [Supplier Maintenance](#)

Reference Documents

- [Close Schedule](#)
- [Payment Request Distribution Table](#)

Process Flows



UPK Playback Options

See It
Try It
Know It
Do It

UPK - Oracle EBS R12 - Microsoft Internet Explorer

Oracle User Productivity Kit

Playback Mode

See It! Try It! Know It? Do It!

Outline

Search GO

All

- Oracle EBS R12 Assets
- Oracle EBS R12 Financials Center
- Oracle EBS R12 General Ledger
- Oracle EBS R12 Human Resources
- Oracle EBS R12 Internet Expense
- Oracle EBS R12 iProcurement
- Oracle EBS R12 iSupplier Portal
- Oracle EBS R12 Payables
 - Maintaining Suppliers
 - Entering Suppliers**
 - Reviewing and Adjusting
 - Identifying Duplicate Suppliers
 - Merging Suppliers
 - Viewing Supplier Merge
 - Setting Up Supplier Hierarchy
 - Entering Employees As Suppliers
 - Adding a New Supplier
 - Managing Invoices
 - Processing Payments
 - Expense Reports
 - Credit Cards
 - Payables Accounting
 - Holds
 - Foreign Currency
 - Reviewing Funds Disbursement
 - Funds Disbursement Process

Concept

Set up and maintain suppliers in the **Suppliers** page to record information about individuals and companies from whom you purchase goods and services. You can also enter employees whom you reimburse for expense reports. When you enter a supplier that does business from multiple locations, you store supplier information only once, and enter supplier addresses for each location. You can designate supplier addresses as payment, purchasing, RFQ only, or procurement card locations.

In this topic, you will enter a supplier.

Introduction

UPK Try IT Mode

ORACLE Payables

Home Logout Preferences Help Diagnostics

Suppliers

Suppliers

Create Supplier

Search

At least one search criteria is required. Including part of supplier's name or number will improve the search performance. Fields are case insensitive.

Supplier Name

Supplier Number

Taxpayer ID

Tax Registration Number

DUNS Number

[Show More Options](#)

Concept

Set up and maintain suppliers in the **Suppliers** page to record information about individuals and companies from whom you purchase goods and services. You can also enter employees whom you reimburse for expense reports. When you enter a supplier that does business from multiple locations, you store supplier information only once, and enter supplier addresses for each location. You can designate supplier addresses as payment, purchasing, RFQ only, or procurement card locations.

In this topic, you will enter a supplier.

To Do List

[New Supplier Requests\(0\)](#)

[Prospective Supplier Registrations\(0\)](#)

[Supplier Address Requests \(0\)](#)

[Supplier Contact Requests \(0\)](#)

[Business Classification Requests \(0\)](#)

[Product and Services Requests \(17\)](#)

[Account Requests\(0/0\)](#)

Try It! **Actions** **X**

Click the **Create Supplier** button.

Tax Registration Number	DUNS Number	Update

Copyright (c) 2006, Oracle. All rights reserved.

UPK Do IT Mode

ORACLE® Payables

Home Logout Preferences Diagnostics

Suppliers >

Create Supplier

* Indicates required field

Supplier Type

Standard supplier

* Organization Name

Alias

Name Pronunciation

D-U-N-S Number

URL

Context Value

Country of Origin

Tax Registration Number

Taxpayer ID

Home Logout Preferences Diagnostics

About this Page Privacy Statement

Sits on top of live application

Do It!

Actions

The **Create Supplier** page enables you enter organization name, supplier number, supplier type in order to create a supplier.

ORACLE® Payab

Suppliers >

Create Supplier

* Indicates required field

* Organization Name

Alias

Name Pronunciation

D-U-N-S Number

URL

Must include

UPK Usage Tracking

Usage Tracking - Microsoft Internet Explorer

Usage Tracking

User Productivity Kit

Main Page

Reports

- [Edit/Run reports](#)
- [Refresh Outline](#)

User Access

- [Add new user](#)
- [Edit existing user](#)
- [Delete user and usage history](#)

[View Error Log](#)

Selected Details - Page:1

Sort by date: Records Per Page:

[<<Previous Page](#) | [Next Page >>](#) [Return to report](#)

Date/Time	Application	Module	Lesson	Topic	User	Time	Mode	Score	Passed
1/14/2004 12:12:52 PM	PeopleSoft 8	Using PeopleSoft 8.8 Budgeting	Using Budget Work Items and Versions	Sending Users Emails About a Budget	jfaulk	00:00:08	Try It!		
1/14/2004 12:13:08 PM	PeopleSoft 8	Using PeopleSoft 8.8 Budgeting	Using Budget Work Items and Versions	Sending Users Emails About a Budget	jfaulk	00:05:28	Know It?	93	Yes
1/14/2004 4:22:49 PM	PeopleSoft 8	Using PeopleSoft 8.8 Budgeting	Introduction to PeopleSoft Budgeting	Understanding Roles within Budgeting	tlew	00:00:11	Try It!		
1/14/2004 4:24:03 PM	PeopleSoft 8	Using PeopleSoft 8.8 Budgeting	Using Budget Work Items and Versions	Accessing Budgeting Documentation	tlew	00:01:21	Try It!		
1/14/2004 4:31:40 PM	PeopleSoft 8	Using PeopleSoft HR 8.8 - Administer Workforce	Hiring Employees	Understanding the Lifecycle of an Employee	jfaulk	00:00:08	Try It!		
1/14/2004 4:35:35 PM	PeopleSoft 8	Using PeopleSoft CRM 8.8 Sales	Managing Leads	Creating Leads	jfaulk	00:00:05	Try It!		
1/15/2004 9:52:01 AM	PeopleSoft 8	Using PeopleSoft HR 8.8 - Administer Workforce	Hiring Employees	Adding a New Employee	jfaulk	00:00:39	Try It!		
1/15/2004 9:52:53 AM	PeopleSoft 8	Using PeopleSoft HR 8.8 - Administer Workforce	Hiring Employees	Adding a New Employee	jfaulk	00:01:52	Do It!		
1/15/2004 9:54:22 AM	PeopleSoft 8	Using PeopleSoft HR 8.8 - Administer Workforce	Hiring Employees	Adding a New Employee	jfaulk	00:00:18	See It!		

UPK Paper Documents

Instructor Manual

Oracle EBS R12 Payables

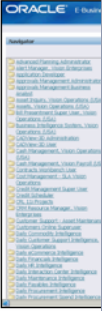
Oracle User Productivity Kit

System Process Document

Oracle EBS R12 Payables: Entering Suppliers

Oracle User Productivity Kit

Procedure



Step	Action
1.	Begin by navigating to the Suppliers page.
2.	Click the vertical scrollbar.
3.	Click the Payables, Vision Operations (USA) link.
4.	Click the vertical scrollbar.
5.	Click the Suppliers : Entry link.
6.	The Suppliers page enables you to set up and maintain suppliers about individuals and companies from whom you purchase goods and services.
7.	Click the Create Supplier button.
8.	The Create Supplier page enables you to enter organization supplier type in order to create a supplier.
9.	Click the Save button.
10.	Enter the desired information into the Save field. Enter "C" in the Supplier Number field.
11.	Click in the Supplier Number field.
12.	Enter the desired information into the Supplier Number field.
13.	Click the Apply button.
14.	The Update Supplier page enables you to view and update supplier information.
15.	Click the Address Book link.
16.	The Update Supplier Address Book page enables you to enter address details.

Date Created: 8/7/2008

Training Guide

Oracle EBS R12 Payables

Oracle User Productivity Kit

In this topic, you will enter a supplier.


Job Aid

Test Document

Entering Suppliers

Oracle User Productivity Kit

Test Procedure



Step	Action	Input	Expected Results	Pass	Fail
1.	Begin by navigating to the Suppliers page.				
2.	Click the vertical scrollbar.				
3.	Click the Payables, Vision Operations (USA) link.				
4.	Click the vertical scrollbar.				
5.	Click the Suppliers : Entry link.				

Date Created: 8/7/2008

Last changed on: 8/7/2008 3:54:00 PM

5 document types from a single source

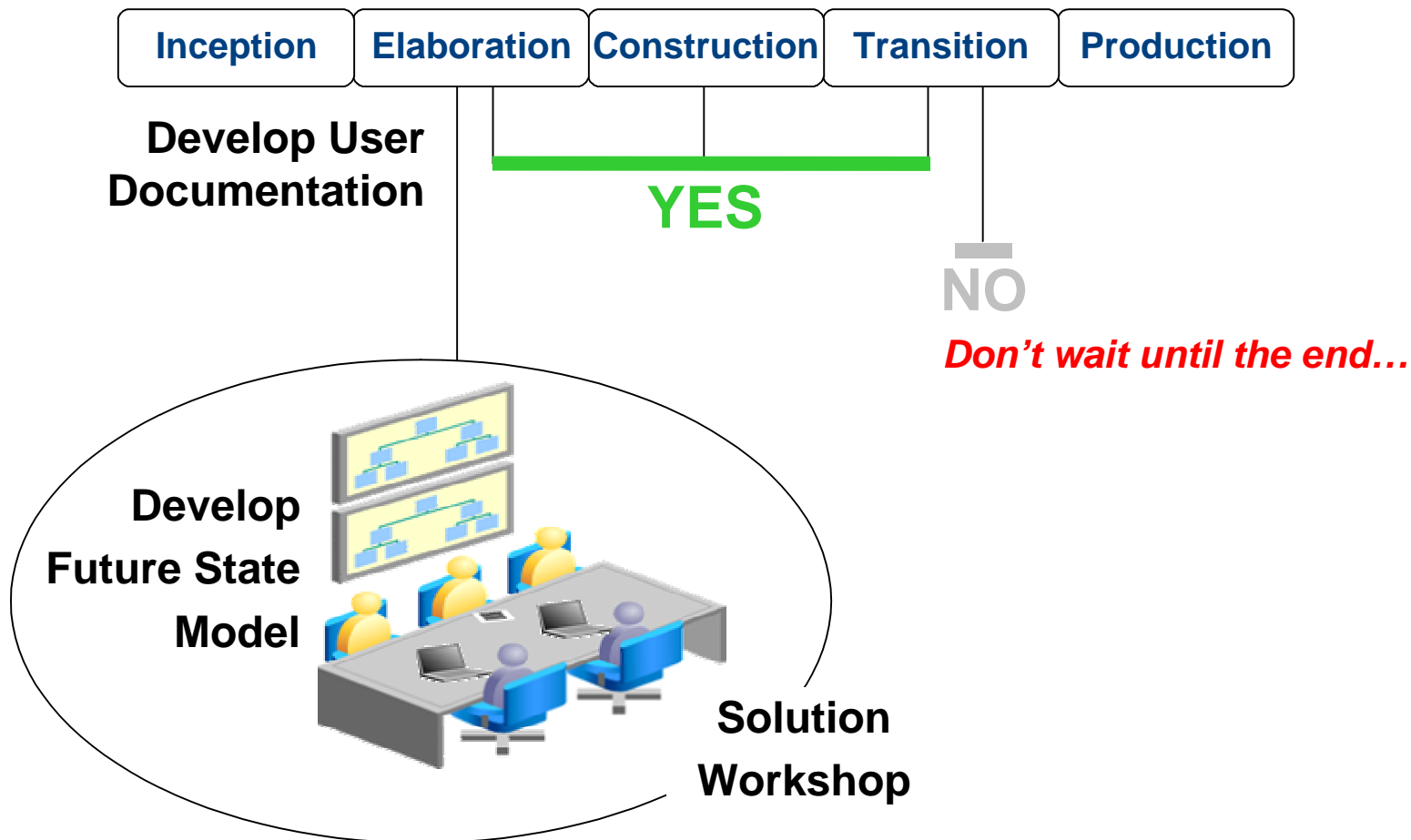
ORACLE®

Proven Method



Oracle Unified Method

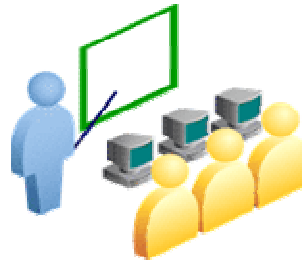
Applications Implementation Phasing



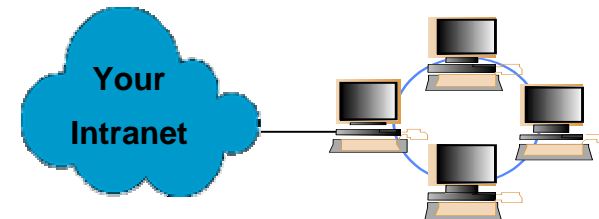
Deployment Options

UPK & Tutor Support:

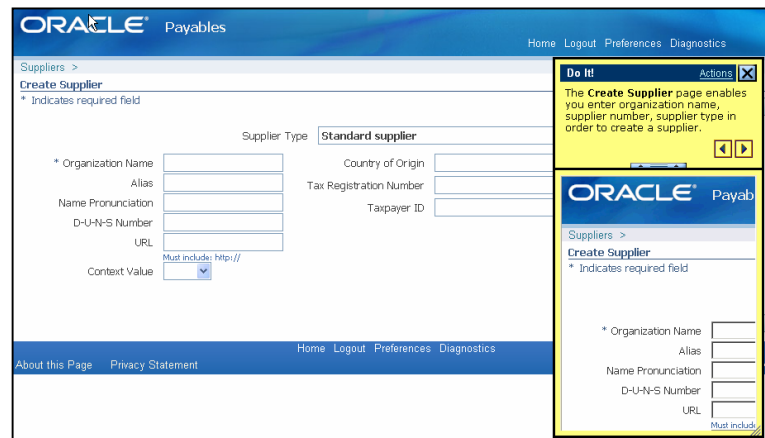
Instructor Led Training



Web Based Training



Production Support



ORACLE Payables

Suppliers >

Create Supplier

* Indicates required field

Supplier Type: Standard supplier

* Organization Name: [Text Field]

Country of Origin: [Text Field]

Alias: [Text Field]

Name Pronunciation: [Text Field]

D-U-N-S Number: [Text Field]

URL: [Text Field]

Context Value: [Dropdown Menu]

Country of Origin: [Text Field]

Tax Registration Number: [Text Field]

Taxpayer ID: [Text Field]

Must include: http://

Home Logout Preferences Diagnostics

About this Page Privacy Statement

Do It!

The **Create Supplier** page enables you enter organization name, supplier number, supplier type in order to create a supplier.

ORACLE Payables

Suppliers >

Create Supplier

* Indicates required field

* Organization Name: [Text Field]

Alias: [Text Field]

Name Pronunciation: [Text Field]

D-U-N-S Number: [Text Field]

URL: [Text Field]

Must include: [Text Field]



Benefits of Documentation

Manage Change

- Provide users and managers confidence in job execution
- Effectively train new hires or new users
- Roadmap for continuous improvement

Minimize Risk

- Users run applications as designed
- Key organizational information is documented



Address Compliance

- Fulfill compliance requirements
- Deploy standards
- Reduce audit costs

Increase Productivity

- Users reach productive levels faster



Productive Day ONE

Right Tools – UPK & Tutor

Right Content – Baseline documents & simulations

Right Approach

- Develop Solution in Solution Workshop (CRP 1)
- Document Solution in Solution Workshop (CRP 2&3)
- Deploy Documentation
- Train End Users
- Test End Users

Together, UPK & Tutor provide a complete documentation solution addressing the employees main question at go-live:

How do I do my job using these new Applications?



Berlin Packaging, Inc

Steven Canter

Chief Information Officer

“Compared to our previous methods, Oracle User Productivity Kit has helped us reduce the costs of creating and delivering IT systems training by more than 75%. And with Tutor, we anticipate even better ROI”

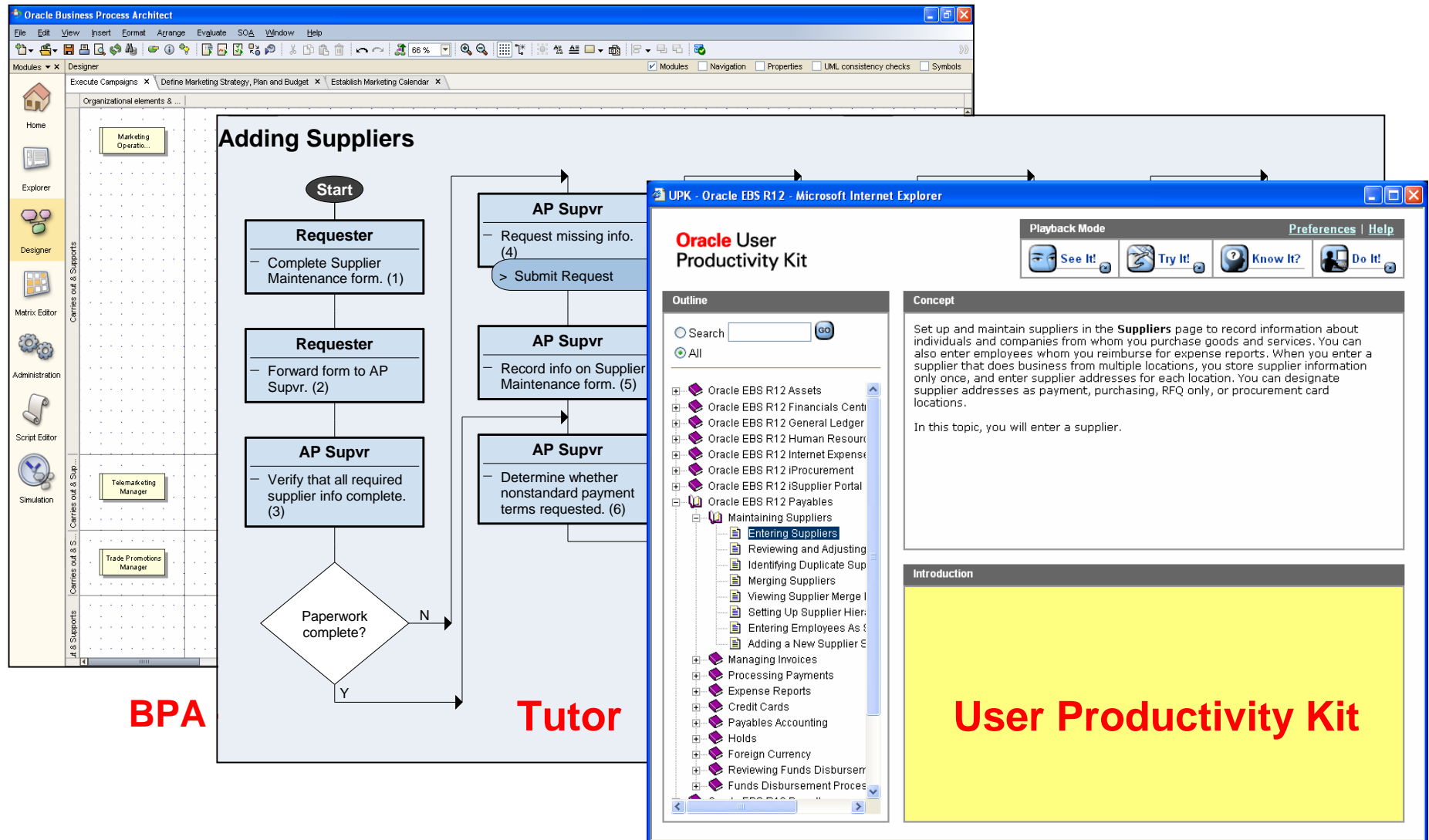


AAI Corporation
Jim Glowacki
Director of Operations
&
Jennifer Donnelly
Sr. Continuous Improvement
Specialist

“Since we moved to using Tutor we’re writing procedures 75% faster due to standard formatting and the simple, Word based, software tools. With Tutor’s text and graphical flowchart, it’s easier for employees to quickly understand AAI’s business practices.”

“Now, UPK is adding an additional dimension, an interactive on-demand applications training solution linked to our business procedures.”

The Future of Documentation at Oracle





T U User Productivity Kit

T O R

Oracle's Tutor and UPK

People to People & People to System

Providing Depth and Breadth

- business process flow
- user documentation
- training

Productive Day ONE

ORACLE®