

ORACLE UPK PRE-BUILT CONTENT FOR: E-BUSINESS SUITE R12.1



Oracle's User Productivity Kit (UPK) is a collaborative content development platform that drives end-user and project team productivity throughout all phases of the software ownership lifecycle. UPK pre-built application specific content provides significant additional benefit beyond the UPK Developer for enterprises deploying Oracle E-Business Suite applications.

UPK application specific content created by Oracle is released in English and documents best practices to help organizations achieve faster ROI and manage knowledge more efficiently and effectively.

UPK Application Content: “As Delivered” System Process References

The value of UPK pre-built application content starts from the premise that implementation project teams can save substantial time and labor by leveraging UPK application content as baseline reference system process flows first and then iterating to capture specific business process requirements. The savings can be substantial – project team resources typically dedicated to the preparation of system test data, storyboarding, and process standardization can be greatly reduced.

Mirrors Oracle Application Development Methodology

Key to the value of UPK application specific content is the fact that it is authored in tight collaboration with the actual developers who wrote the code, thus creating content which accurately reflects industry best practices with detailed conceptual information.

Delivering Value Throughout the Software Lifecycle

The value of UPK application content has relevance in many phases common to software implementation projects. For example, early on in the project lifecycle, UPK play back capabilities allow implementation leads to educate themselves on the delivered system process flows (vanilla functionality) of the new application without having to actually configure a “sand-box” environment, mitigating costs associated with labor and hardware and reducing the new functionality “learning curve.”

Eliminate Dedicated Instances To Analyze Delivered Functionality

Once the delivered functionality and process flows of the new application are understood, the project team can use the UPK content as an aid to do the fit-gap analysis. For this phase of the project lifecycle, the functional expert visually moves through a UPK simulation – leveraging the application specific content – while noting in the test document the configuration and/or customizations necessary to achieve the desired business outcome.

Customizing Pre-Built Content

Over the course of an implementation or upgrade, the UPK pre-built content can evolve until it mirrors the final deployed application. The existing pre-built content can easily be modified using the UPK Developer to capture the configuration changes or steps in the new process. UPK's re-record feature also enables a guided recapture of screens and steps in the application so your UPK content reflects the final state of your application.

Use the UPK Developer to easily customize the content to match your organization's needs. The UPK Content products contain the following sections:

Asset Collections

Using Oracle Advanced Collections

Interacting with Customers

Processing Transactions

Managing Delinquencies

Using Dunning Plans

Using Strategies

Managing Collections in Leasing

Creating Reports and Statements

Advanced Supply Chain Planning

Viewing Planning Information

Defining Plans

Performing Collections

Modeling the Supply Chain

Viewing Exceptions

Analyzing Plans

Managing Plans

Using Constrained and Optimized Plans

Querying Supply Chain Plan Information

Using Planning Strategies

Setting Up and Defining the Distribution Plan

Analyzing and Managing the Distribution Plan

Asset Management

Setting Up EAM

Performing Asset Setup Tasks

Using the Activity Workbench
Performing Other eAM Setup Transactions
Setting Up Non-Stock Direct Items
Setting Up Preventive Maintenance
Setting Up Work Order Billing
Using eAM Work Management
Using eAM Work Order Planning
Performing Preventive Maintenance Transactions
Using eAM Planning and Scheduling
Using eAM Cost Management
Generating eAM Cost Variance Reports
Enabling Direct Item Procurement for eAM Work Orders
Using eAM Contractor Services
Using eAM Project Manufacturing
Using Self-Service Transactions
Using the Maintenance User Workbench
Performing Maintenance Super User Transactions
Using Stores

Assets

Adding Asset Specifying Details (Detail Additions)
Using Asset Maintenance
Retiring Assets
Maintaining Depreciation
Maintaining Group Depreciation
Performing Online Inquiries
Performing Accounting Tasks
Using Tax Accounting
Setting Asset Controls
Running Asset Additions Reports

Collaborative Planning

Setting Up and Administering Collaborative Planning
Planning

Forecasting

Handling Exceptions and Notifications

Compensation Workbench

Setting up Total Compensation Elements

Setting up Payroll Elements

Defining an Element's Input Values

Generating Element Links

Setting Up Compensation Workbench Plans

Using Compensation Workbench Tasks

Running Reports and Processes in CWB

Entering Compensation Surveys

Setting up Grades and Pay

Using Individual Compensation Distribution (ICD)

Setting up ICD for Employees and iRecruitment Applicants

Using ICD for Line Managers, Employees and HR Professionals

Using Compensation History

Using Total Compensation Statements

Complex Maintenance, Repair, and Overhaul

Setting Up a CMRO Organization

Integrating with Discrete Manufacturing

Integrating with Enterprise Asset Management

Integrating with Logistics

Integrating with Planning

Integrating with Projects

Integrating with Service

Integrating with Order Management

Integrating with Purchasing

Additional CMRO Setup

Aircraft Induction

Heavy Maintenance Planning

Transit and Line Maintenance

Engine Maintenance

Heavy Maintenance Execution

Material Marshalling

Contract Lifecycle Management for iProcurement – Public Sector

Using the Shop Tab

Using Line Structures

Approving a Requisition

Using and Managing Requisitions

Using the Receiving Tab

Contract Lifecycle Management for iSupplier Portal – Public Sector

Managing Supplier Profiles

Navigating and Searching

Viewing Award Information

Acknowledging Awards and Modifications

Viewing Shipping Information

Using the Finance Tab

Contract Lifecycle Management for Procurement Contracts – Public Sector

Using Contract Workbench

Using the Terms Library

Working with Contracts Expert

Working with Miscellaneous Contract Types

Contract Lifecycle Management for Purchasing – Public Sector

Using the Requisitions Tab

Using the Awards Tab

Creating and Using Award Modifications

Using the IDVs Tab

Using Receiving

Using the Suppliers Tab

Contract Lifecycle Management for Sourcing – Public Sector

Using the Requisitions Tab

Creating Solicitation Components

Creating Solicitations

Using Collaboration Scoring

Entering Contract Terms

Creating Solicitation Amendments

Receiving and Evaluating Offers

Integrating with FedBizOpps

Using the Administration Tab

Depot Repair

Setting Up Oracle Depot Repair

Using Oracle Depot Repair

Using the Depot Workbench

Understanding Oracle Depot Repair Business Scenarios

Using the Repair Manager Portal

Receiving Returns using the Bulk Receiving Module

Executing Repairs using the Repair Technician Module

Discrete Manufacturing Bills of Material

Setting Up Oracle Bills of Material

Creating and Using Bills of Material

Creating and Using Routings

Deleting Information

Defining Configure to Order Items

Defining Manufacturing Lead Times

Generating Reports and Running Processes

Discrete Manufacturing Engineering

Setting Up

Engineering Change Orders

Integrating Engineering Prototype data with Manufacturing data

Discrete Manufacturing Quality

Using Collection Elements

Setting Up Specifications

Using Collection Plans
Managing Quality Data Collection
Using the Quality Workbench
Managing Supplier Quality
Managing Manufacturing Quality
Creating Charts, Views, and Reports

Electronic Kanban

Setting Up Electronic Kanban
Planning Pull Sequences
Viewing Kanban Summary Information
Performing Kanban Card Actions
Viewing the Kanban Dashboard

Field Service

Creating Field Service Tasks and Adding Task Attributes
Understanding Skills Management
Scheduling Field Service Tasks
Managing Field Service Task Schedules
Managing Field Service Technician Trips
Receiving and Accepting Work Assignments
Debriefing Work Completion

Financials Centralized Solution Set

Maintaining Bank Accounts
Creating Accounting and Transfer Journal Entries to GL Programs
Using the Accounting Methods Builder
Creating Subledger Journal Entries
Running the Open Account Balances Listing
Processing Inquiries
Managing Tax Profiles and Registrations
Managing Configuration Owners and Service Providers
Setting Up Fiscal Classifications
Managing Transactions

Fundamentals for E-Business Suite

Getting Started with Oracle E-Business Suite

Using Forms-based Applications

Using OA Framework-based Applications

Using Help

General Ledger

Performing Journal Entry Transactions

Performing Online Inquiries

Defining Budgets

Managing Budget Organizations

Managing Budget Formulas

Entering Budget Amounts

Transferring Budget Amounts

Freezing Budgets

Using Encumbrance Accounting

Processing Average Balances

Using Financial Reporting

Performing General Ledger Maintenance

Using the Global Consolidation System

Managing Multi-Currencies

Managing Journal or Subledger Level Reporting Currencies

Using the Account Hierarchy Manager

Setting Up Oracle General Ledger

Generating Custom General Ledger Reports

Global Order Promising

Running ATP Processes

Specifying ATP Availability Options

Working With Allocation Rules

Performing ATP Inquiries

Human Resources

Using Organization Structures

Entering Organization Information
Creating and Maintaining Job Positions
Using Person Types and Employment Groups
Using Employment Agreements
Configuring HRMS
Setting Up Work Structures
Hiring Employees
Setting Up Employees
Managing Absences
Performing Global Deployment
Ending Employment
Managing People
Running Workforce Reports
Using People Folders and Assignments
Defining Human Resource Budgets
Setting Up Human Resources Users and Responsibilities
Using HR Help Desk

Incentive Compensation

Plan Administrator: Creating Top Down Plans
Plan Administrator: Managing Compensation Plans
Plan Administrator: Managing Component Libraries
Plan Administrator: Managing Product Classifications
Sales Operations: Managing Sales Crediting
Plan Administrator: Modeling Plans
Compensation Analyst: Viewing Resources
Compensation Analyst: Processing Transactions
Compensation Analyst: Processing Payment Batches
Compensation Analyst: Adjusting Transactions
Compensation Manager: Setting Up Payment Parameters
Compensation Analyst/Manager: Publishing Reports
Incentive Compensation Administrator: Using the Configuration Workbench
Incentive Compensation User: Using Manager Self Service

System Administrator: Archiving

Install Base

Managing Searches

Managing Item Instances in Oracle Install Base

Working with Systems

Using the Transactions Tab

Using the Mass Update Facility

Performing Oracle Install Base Related Tasks in Other Oracle Applications

Using the Open Interface Program

Purging Transaction History

Setting Up Counters

Managing Counter Instances in Oracle Install Base

Administering Counters

Internet Expenses

Configuring Expenses

Managing Credit Card Transactions

Using Oracle Audit Management

Inventory

Setting Up Oracle Inventory

Defining Item Setup and Control

Defining and Maintaining Item Information

Defining Lot Control

Defining Serial Control

Defining Material Status Control

Defining Transaction Setup

Performing Transactions

Managing On Hand Quantities and Item Availability

Using Move Orders

Defining Planning and Replenishment

Using Cost Accounting and Control

Performing an ABC Analysis

Performing Cycle Accounting

Performing a Physical Inventory

Inventory Optimization

Working with an Inventory Plan

Setting Plan Options

Reviewing Key Setups

Working with Queries

Analyzing Output

iProcurement

Maintaining Catalog Content

Managing Product Presentation

Setting Up iProcurement Users

Reviewing User Self-Management

Searching and Browsing

Managing Requisitions

Performing Basic Shopping

Shopping: Requisition Line Editing

iRecruitment

Setting Up iRecruitment Information

Configuring iRecruitment Pages

Managing Assessments

Managing Vacancies

Using Job Search Aids

Processing Candidates

Managing Communication

Managing Interview Tasks

Working with Applicants

Using Recruitment Summaries

Using the Employee Interface

Managing iRecruitment for Agency Users

Generating Letter and Reports

iSupport

Defining Home Page Content and Layout

Customizing Oracle iSupport Home Page

Using Oracle iSupport

Using Oracle Installed Base

Searching in Oracle iSupport

Changing User Profile Information

Maintaining Users

Managing Service Request Templates

iSupplier Portal

Entering Registrations

Navigating and Searching

Viewing Order Information

Viewing Shipping Information

Viewing Planning and Inventory Information

Viewing Invoice and Payment Information

Managing Supplier Profile Management

Using Buying Company View

Setting Up Supplier Users

Setting Up Suppliers

Learning Management

Setting Up Oracle Learning Management

Managing Learner Groups

Managing Administrator Groups

Using Electronic Records and Electronic Signatures

Using Catalogs

Creating Learning Paths and Certifications

Managing Content Structures

Managing Tests

Importing and Exporting Course Content

Managing Resources

Managing Pricing and Financing

Managing Enrollment

Using Self-Service Interfaces

Running OLM XML Reports

Lease and Finance Management

Setting Up Leases

Authoring Contracts

Invoicing to Receipt

Quoting to Termination

Performing Accounting Transactions

Performing Lease Center Operations

Performing Customer Self Service Operations

Manufacturing Operations Center

Setting Up the Administrator Role

Setting Up Sites

Setting Up Sustainability Aspect

Setting Up Time Dimension Hierarchies

Setting Up Equipment Dimensions

Setting Up Tags and Contextualization

Setting Up Extensible Attributes

Applying the User Role

Using the Manufacturing Operations Center Catalog

Using the Plant Manager Dashboard

Understanding the Facilities Manager Dashboard

MES for Discrete Manufacturing

Using the Administrator Role

Using the Operator Role

Using the Supervisor Role

MES for Process Manufacturing

Configuring the Administrator Role

Using the Operator Workbench

Performing Dispensing Tasks

Performing Production Supervisor Tasks

Order Management

Performing Order to Cash Lifecycle Procedures

Performing Order Inquiry

Creating Return Material Authorization (RMA) Types

Creating Sales Agreements

Dropping Shipments

Defining Back to Back Orders

Creating Internal Orders

Performing Actions on Orders

Tracking Changes

Performing ATP, Reservations and Scheduling

Creating Basic Pricing

Performing Order Management Processes

Using Invoicing and Payments

Managing Sales Contracts

Using the Order Information Portal

Payables

Maintaining Suppliers

Managing Invoices

Processing Payments

Entering and Processing Expense Reports

Processing Credit Card Transactions

Managing Payables Accounting

Managing Holds

Managing Foreign Currency

Reviewing Funds Disbursement Setup Options

Using the Funds Disbursement Process Home Page

Payroll

Calculating, Balancing, and Validating Payroll

Altering Payroll Results by Recalculation

Confirming Payroll Complete

Managing Payroll Payment Distribution
Calculating Distribution

Performance Management

Setting up Performance Management
Setting up Appraisals
Performance Management Plans
Objectives Management
Managing Appraisals
Managing Performance Management

Price Protection

Setting Up Price Protection
Creating Price Protection Transactions
Adjusting Price Protection Transactions
Approving Price Protection Transactions
Creating Price Protection Claims
Viewing Price Protection Transaction History
Running Reports and Concurrent Programs

Process Manufacturing Process Costing

Setting Up
Using Standard Costing
Using Actual Costing
Using Lot Costing
Using the OPM Landed Cost Management Integration
Copying Costs
Setting Up Subledger Accounting
Processing Period-End Costs
Using OPM Cost Management Reports

Process Manufacturing Process Execution

Using Firm Planned Orders
Creating and Maintaining Batches

Creating Reservations and Managing Batch Materials

Using the Ingredient Picking Workbench

Producing Batches

Completing Batches

Using Inquiries

Using the Process Execution Workbench

Using the Production Scheduler Workbench

Running Reports and Concurrent Programs

Process Manufacturing Process Quality

Setting Up Process Manufacturing Quality Management

Managing Test Data

Managing Specifications

Collecting Samples

Managing Results

Managing Stability Studies

Process Manufacturing Product Development

Setting Up Product Development

Defining Formulas

Maintaining Operations

Defining Routings

Maintaining Recipes

Working with Search and Substitution Functions

Using Least Cost Formulation

Process Manufacturing Regulatory Management

Setting Up Regulatory Management

Setting Up Regulatory Item Information

Process Manufacturing System Administration

Setting Up OPM System Administration Functions

Understanding the Migration Process

Performing Archive and Purge

Setting Up Approval Process Workflow

Product Hub

Setting Up the Item Catalog

Setting Up Attributes and Functions

Using Item Catalog Category Versions

Using Alternate Catalogs

Using the Item Catalog

Setting Up and Using Role Based Security

Managing Changes

Creating New Item Requests

Using Style and SKU Items

Setting Up and Managing Item Structures

Using the Product Workbench

Synchronizing Product Data and Managing Data Quality

Using Item Business Rules

Project Billing

Managing Agreement Templates

Managing Agreements and Funding

Accruing Revenue

Generating Invoices

Project Costing

Setting up Profile Options

Implementing Labor Costing

Using Labor Costing

Implementing Capital Projects

Implementing Capitalized Interest

Implementing Allocations

Implementing AutoAllocation

Implementing Burdening

Implementing Cross Charge - Borrowed and Lent

Implementing Expenditures

Creating Expenditures

Burdening

Using Allocations

Capitalizing Assets

Project Foundation

Implementing Nonlabor Costing

Setting Up a Project

Working with Rate Schedules

Working with Project Roles

Attaching Resource Lists

Using Planning Resource Lists

Using Resource Breakdown Structures

Using the Project Manager Responsibility

Creating and Updating Workplans

Managing Workplan Effort and Cost

Defining Jobs

Project Management

Setting Up Change Management

Working with Change Management

Setting Up Workplan

Creating and Updating Workplans

Managing Workplan Effort and Cost

Managing Programs

Integrating Microsoft Project with Oracle Projects

Setting Up Budgeting and Forecasting

Budgeting and Forecasting

Managing Issues

Managing Project Performance

Setting Up Project Status Reporting

Reporting Project Status

Project Resource Management

Defining Jobs

Setting up Resource List
Creating Team Templates
Staffing Priority Codes
Assigning Resource
Defining Advertisement Rules
Viewing Budgets and Forecasts
Reporting Project Performance
Setting up Requirement Status Profile Options
Setting up Candidate Status Profile Options
Setting up Assignment Status Profile Options
Using Project Manager Responsibility
Staffing Manager Responsibility

Purchasing

Performing the Document Approval Process
Entering Requisitions
Entering Purchase Order Agreements
Entering Purchase Orders
Entering Planned Purchase Orders
Entering Purchase Order Releases
Viewing Tax Information in Purchasing
Using the Professional Buyer's Workcenter
Receiving in Purchasing
Performing Purchasing Inquiries
Using Purchasing Approval, Security, and Control
Using Supply Base Management
Defining Automatic Sourcing
Using the Approved Supplier List
Entering Request for Quotes (RFQs)
Managing Quotations
Performing Receipt Accounting
Using Standard Purchasing Functions
Viewing Purchasing Reports
Using Engineering & Construction Enhancements

Using Pricing Transparency

Rapid Planning

Using the Workbench

Using Common Workspace Features

Using Plan Details Functionality

Managing Simulation Sets

Using Exceptions

Using Metrics

Performing Workbench Actions

Performing Simulations

Setting Up

Receivables

Managing Receipts

Managing Bills Receivable

Managing Customers

Managing Collections

Managing Documents

Performing Accounts Receivable Transactions

Managing Revenue

Using Accounting for Receivables

Using the Funds Capture Process Home Page

Self-Service Human Resources

Talent Management

Using the Common SSHR Modules

Manager Self-Service: Manager Actions

Manager Self-Service: Termination

Manager Self-Service: Maintaining Assignments

Manager Self-Service: Hiring

Employee Self-Service: Maintaining Personal Information

Using Competencies and Qualifications

Employee Self-Service: Employee Actions

Service Contracts

Setting Up Oracle Service Contracts
Setting Up Service Pricing and Billing
Creating Contracts
Entering Defaults for Contracts
Entering Service Lines
Entering Usage Lines
Entering Subscription Lines
Ordering Service in Oracle Order Management
Adjusting Prices
Approving Contracts
Using the Administrator Workbench to Manage Contracts Under Negotiation
Using the Customer Acceptance Portal
Extending and Renewing Contracts
Terminating Contracts
Setting Up Standard Coverage and Subscription Templates

Service Parts Planning

Setting Up Source and Destination Data
Defining Forecasting Rules
Collecting Source Data
Setting Plan Options
Performing Miscellaneous Planning Activities

Shipping Execution

Using Shipping Transactions
Searching with Query Manager
Managing Trips
Managing Deliveries
Managing Delivery Lines
Managing Containers
Using Pick Release
Using Ship Confirm

Using Shipping Exceptions

Using Oracle Workflow with Oracle Shipping Execution

Setting up Shipping Execution Steps

Shop Floor Management

Defining Parameters

Setting Up Shop Floor Management Attributes

Managing Network Routing

Launching Shop Floor Modeling

Performing Shop Floor Execution: Supervisor Workbench

Managing Operator Workstation

Viewing Jobs

Executing Lot Transactions

Creating Lot and Serial Controlled Assemblies

Launching the Resource Scheduling Workbench

Viewing Lot Genealogy

Specifying Co-Products

Closing Lot Based Jobs

Executing WIP Lot Transactions

Transacting Material Supply

Site Hub

Using the Administrator Role

Using the Site User Role

Sourcing

Adding Line Attributes to Auction or RFQ

Applying Contract Terms to a Sourcing Document

Copying a Sourcing Document

Creating a Supplier Response PDF

Creating and Managing a Sourcing Event

Creating Awards

Creating Negotiations

Creating Proxy and Power Bids

Creating Sourcing Documents using the Demand Workbench

Customizing the Sourcing Pages
Defining Service-based Lines
Managing Cost Factors
Managing RFIs
Setting up Negotiations
Supplier Response via Spreadsheet
Using Enhanced Spreadsheet Support
Using Sourcing Optimization Enhancements
Using Two-Stage RFQs
Using Weighting and Scoring when defining a Negotiation
Understanding Earnest Money Deposit

Strategic Network Optimization

Working With Models
Viewing and Entering Supply Chain Data
Finding and Replacing Data
Using Currency Rates in Models
Mitigating Risk
Modeling Scenarios and Events
Reporting and Extracting Data
Working With the Data Editor

Time and Labor

Configuring Time Cards
Defining Work Patterns
Assigning Preferences
Entering Time Cards
Approving Time Cards
Assigning Timekeeper
Processing Time Cards

U.S. Federal Financials

Performing Budget Execution
Using Federal Procure to Pay

Using the Prompt Payment Process

Managing Receivables

Generating Federal Financials Reports

Warehouse Management

Using the Oracle Warehouse Management Rules Engine

Performing Material Management

Using Task Management

Managing Inbound Logistics

Performing Crossdocking

Managing Outbound Logistics

Using Wave Planning

Label Printing and Defining Material Handling Equipment

Performing Cartonization, Consolidation, and Packing

Shipping

Work in Process

Setting Up Oracle Work in Process

Creating and Maintaining Jobs

Issuing Materials

Managing Resources

Performing Shop Floor Transactions

CONTACT US

For more information on UPK and application specific content for Oracle application product families go to <http://www.oracle.com/goto/upk/user-productivity-kit.html>.

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