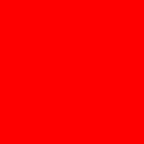




Your. Open. World.

Oracle User Productivity Kit: An Introduction

Barb Canham, Product Strategy Director, Oracle
Beth Goins, Systems Analyst, School District of Manatee



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.

Program **Agenda**

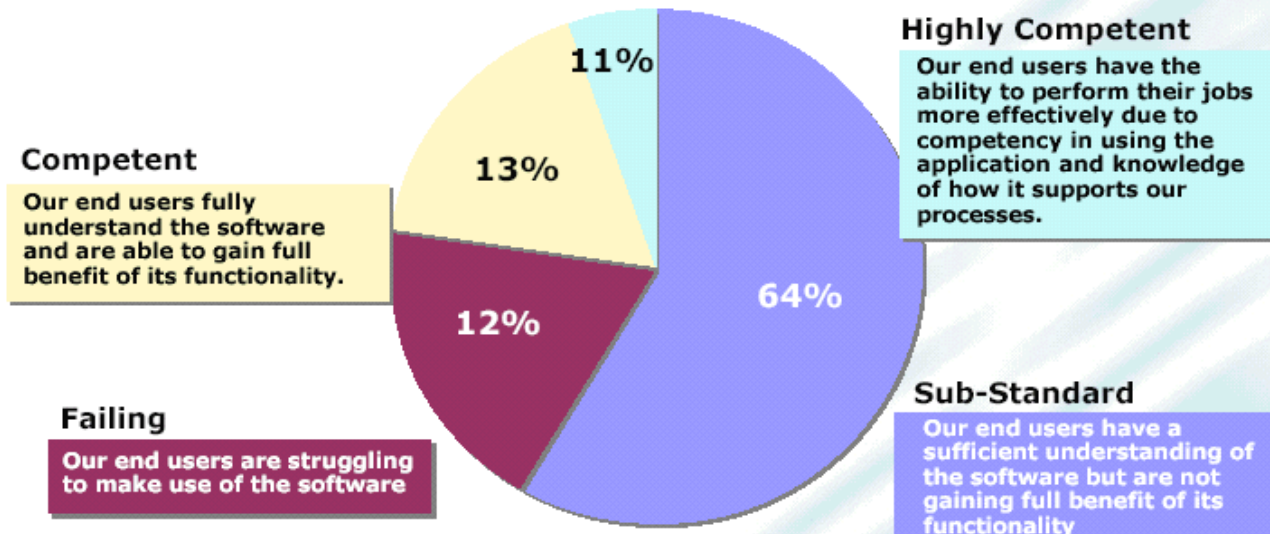
- What is UPK?
- Benefits of UPK?
- UPK Developer
- Playback Modes
- Available Content
- Demonstration of UPK Content
- Customer Experience





Importance of User Competency

76% of Firms Polled Face User Competency Challenges



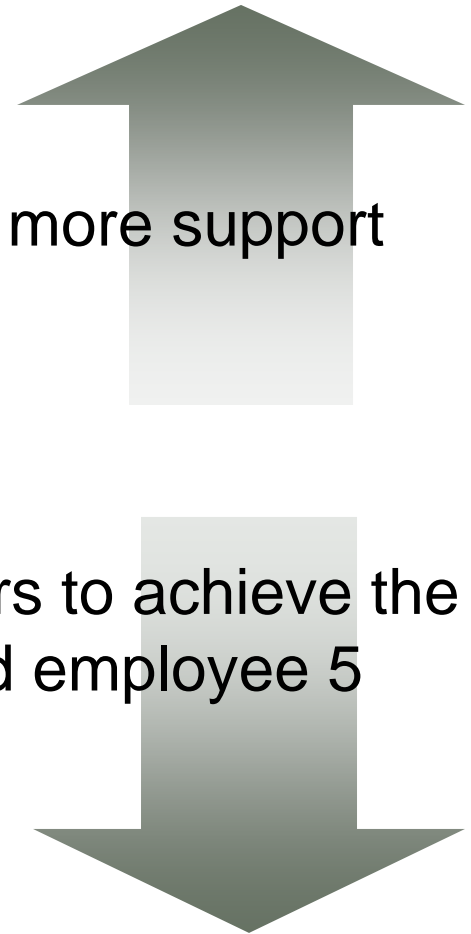
How competent are your end users?

Source: ERP Competency Multi-Client Study, META Group 2003



Importance of Training End Users

- Excessive support cost
 - Untrained users require 3 to 6 times more support than trained users *
- Decreased productivity
 - Untrained users take up to 22.5 hours to achieve the same skill level that it takes a trained employee 5 hour to achieve*



*Gartner



End User Competency Challenges

- How do I address “pre-go-live” training and “post-go-live” support?
- How will I address new-hire training?
- How will I address key people leaving the company or retiring?
- How do I address local and remote users?
- How do I provide standardized content across multiple content development efforts and lines of business?
- How will I providing localized content for global rollouts?
- How will I deliver training? Classroom training? Web-based training? Both?



Implementation/Upgrade Challenges

- How will I manage change in my organization?
- How can I minimize risk to my company?
- Should I change my business processes or should I customize the application?

What is User Productivity Kit (UPK)?

- Complete content development platform for JD Edwards World, Enterprise One, PeopleSoft Enterprise, Siebel and Oracle EBS
- Quickly create consistent training and support materials
- Easily customizable
- Can create content on green screen on Java client
- Easily translated into a variety of languages
- Multiple deployment options



Developer Overview

- Synchronized content platform for creating documentation, training and performance support across the enterprise
- Use generally limited to a team of content authors
- Content is made available to users through a player
- Content includes simulations, in-application support, and interactive documentation
- Users gain a well-rounded knowledge of software functionality, complete with an understanding of the concepts, by learning how to use a program in both a simulated environment and while working with their own data in a live environment



Language Capabilites

English*

French*

GERMAN*

*Spanish**

Japanese*

Swedish

Canadian French

ITALIAN

Portuguese

Danish

Mexican Spanish

Chinese (Simplified)

Norwegian

Dutch

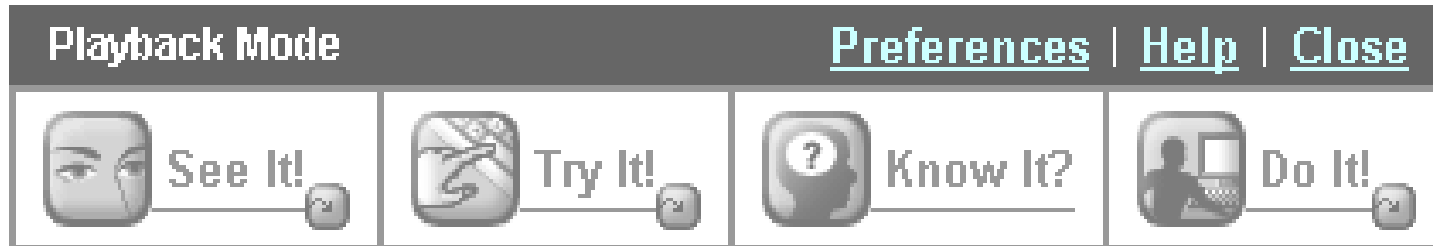
The UPK Developer can export custom text to an .xliff or .doc format

Localized screens are captured with 're-record' mode



*UPK Developer Languages

4 Playback Modes



- See It!
- Try It!
- Know It!
- Do It!

See It! Mode

- Enables a user to learn by watching an animated demonstration of the steps for a task being performed in a simulated environment
- All the required activities, such as moving the mouse and entering data, are completed automatically

Try It! Mode

- Enables a user to learn interactively in a simulated environment
- The user is prompted for mouse clicks and/or keystrokes to complete the task

Know It! Mode

- Is an assessment-type playback mode in which users are instructed to complete a particular task
- Users do not receive step-by-step instructions for completing the task
- Users complete the steps on their own in a simulated environment, and they are scored on how accurately they complete them

Do It! Mode

- Enables a user to learn interactively using live data
- User is presented with a small window on top of the live target application that displays each step for a particular task
- As the user completes each step, he/she can click a button or use a hot-key combination to display the next step in the process
- A thumbnail graphic of the screen is available with a highlight indicating the area where the action should take place
- At this time the JD Edwards World applications do not have the ability to integrate the UPK content with context sensitivity.
- Can use the URL icon for UPK and browse the content



Publishing Formats

- Deployment:
 - Player package
 - HTML web site
 - LMS package
- Documents:
 - Standalone topic files
 - Business process document
 - Job aid
 - Test document
 - Training guide
 - Instructor manual

UPK Paper Documents


- Job Aids
- Documentation
- Test Scripts
- Instructor and Student Classroom Guides

Business Process Document
Oracle UPK Tutor Integrated Content: Add a New Supplier: Indirect/Local

Procedure

Indirect/Local Suppliers are those suppliers who provide material or services but are not for procurement, and do not have a contractual relationship with the organization. See examples.

Minimum Entry Required for Indirect/Local Classification Control
Payment
Bank




Step **Action**

1. Enter the desired information into the **Supplier Name** field. Enter a valid value e.g. "Business Tune".
2. Click the **Classification** tab.
3. Click an entry in the list. Select Type 'Indirect/Local' if no other type applies.
4. Click the **Supplier Type** option.
5. Click the **Control** tab.
6. Enter the desired information into the **Invoice Amount Limit** field. Enter a valid value e.g. "5000". See Tutor Reference Doc **Supplier Invoice Limits** for guidance.
7. Click the **Payment** tab.
8. Click the **Drop Down** object.
9. Scroll the **Terms** object with the mouse wheel. Select 45 Net as standard for Indirect/Local. Click OK.
10. Click the **Bank Accounts** tab.
11. Click the **Bank Name Drop Down** button.
12. Enter the desired information into the **Find** field. Enter a valid value e.g. "966".
13. Click the **Find** button.
14. Click the **OK** button.
15. Click the **Primary** option.

Job Aid: Information into the **Supplier Name** field. Enter "Business Tune".

Test Document
Add a New Supplier: Indirect/Local

Test Procedure



Step	Action	Input	Expected Results	Pass	Fail
1.	Enter the desired information into the Supplier Name field. Enter a valid value e.g. "Business Tune".				
2.	Click the Classification tab. <input type="button" value="Classification"/>				
3.	Click an entry in the list. Select Type 'Indirect/Local' if no other type applies. <input type="button" value="Indirect/Local"/>				
4.	Click the Supplier Type option. <input type="button" value="Job Agency"/>				
5.	Click the Control tab. <input type="button" value="Control"/>				
6.	Enter the desired information into the Invoice Amount Limit field. Enter a valid value e.g. "5000". See Tutor Reference Doc Supplier Invoice Limits for guidance.				

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](#)

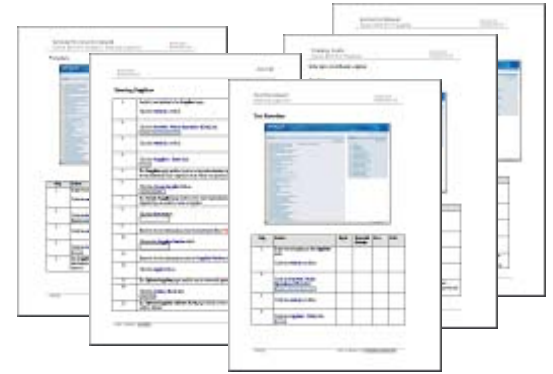
Selected Details - Page:1 [Return to report](#)

Sort by date: Records Per Page:

<<Previous Page | [Next Page >>](#)

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 Content for JD Edwards World



Pre-built Content for
JD Edwards World

UPK Content – JD Edwards World A9.1

15 New Modules!

Foundation

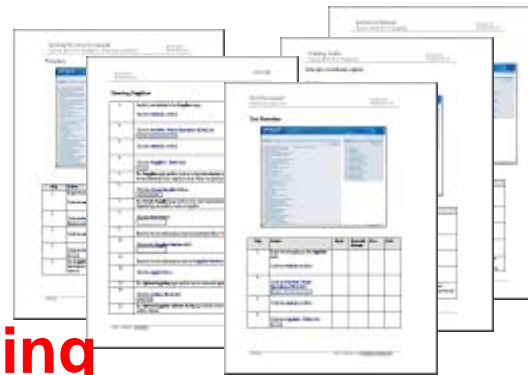
- Common Foundation
- Technical Foundation
- World Writer
- Address Book

Financials

- Accounts Payable
- Accounts Receivable
- General Ledger

Human Capital Management

- US Payroll
- Human Resources Benefits



Distribution

- Inventory
- Purchasing
- Sales Order

Manufacturing

- Product Data Management and Shop Floor Control
- Requirements Planning and Production Scheduling
- Product Costing and Manufacturing Accounting

User Productivity Kit (UPK)

User Productivity Kit (UPK) Collateral and Demonstrations

- <http://launch.oracle.com>
- ENTER PIN: UPKOD

Customer Experience



Customer Experience



Beth Goins

Systems Analyst

School District of Manatee County

Customer Experience



- Consistent Training Content
- Usage tracking
- Training when they need it
- 1 trainer to 800+ users/7000 employees
- Offer better variety of courses/refreshers
- Spotlight monthly training tips (ex: supplier ledger)
- Efficiency: Capture process once, generate on-line course in 4 modes, documentation, training scripts, trainers guide.
- Pass/Fail on Training Scripts at process level to test setup



ORA



JD EDWARDS WORLD

For more information about JD Edwards World

<http://www.oracle.com/applications/jdedwards-world.html>

For more information about JD Edwards World – A9.1 Release

<http://www.oracle.com/applications/jd-edwards-release.html>

JD Edwards World A9.1.2 Statement of Direction

http://www.peoplesoft.com/corp/en/iou/upgrade/world_upgrd_resources_evaluate.jsp

JD Edwards World Upgrade Resources - Evaluate, Plan, and Execute:

http://www.peoplesoft.com/corp/en/iou/upgrade/world_upgrd_resources.jsp

JD Edwards World A9.1 – Transfer of Information – Online Classes

http://education.oracle.com/pls/web_prod-plq-dad/db_pages.getpage?page_id=64&p_org_id=1001

JD Edwards World Resource Center -

http://www.peoplesoft.com/corp/en/support/online_support/wld_resources.jsp

General email: worldinfo_us@oracle.com



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