



# CAPSCIENT

Sound insights. Solid results.

## How UPK Benefits End User Training and Implementation

SCUG

Southern California User Group

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# CAPSCIENT

- Oracle Platinum Partner
- JD Edwards Focused SI
- Implementations, Upgrades, Migrations
- Upgrade Certified (100-day Upgrade Workshop)
- Oracle Business Accelerator Certified / Migration Acceleration
- Special Services (CUPS, CIE, Technical, Roadmaps, UPK, BSI, etc.)
- CAPFLEX – Flexible support / Managed services
- Cloud Services

# Overview

- Introduction
- Features
- Benefits
- Strategies
- Lifecycle Knowledge
- Creative Uses for UPK
- Scripts
- UPK Modes
- Documentation
- Pre-built Content
- Challenges

# What is UPK?

- User Productivity Kit 11.1.0.2
- Oracle Product
- Supports any application
- Captures Business Processes
- UPK is used for long scripted demos, complex business flows, and integrations
- UPK is a great way to allow employees to view the demo as many times needed

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# Features

- Multiple Learning Methods
- Watch and Practice Simulators
- Knowledge Testing
- Numerous Outputs
- Content Management
- Smart Match Context
- Multilanguage Translation
  - 22 Languages
- Records Sound
- Assessment Questions

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# UPK Benefits

- Self-guided training approach
- Reduces Training Timeline
  - Guides and Manuals
- Transition Phase of an Upgrade
  - While recording with SME's they can identify missing items before going live
- Capture Best Practices early on / Jump Start with SME's knowledge
- Highly effective training method
  - Different learning styles
  - Sight / Sound
  - Hands on

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# Benefits - Ease of UPK

- Recorded Simulations
- Hands On
- Control Environment
- Comfortable
- Real World Experience
- Do More with Less!
  - Gain Efficiency
  - Reduce Content

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# Training Benefits

- No IT expert is needed
  - No Code involved
- Reduce the time and effort in implementing
- Train your staff
- Create or Update Content
- Support your organization through the process



Bank\_Editor.swf

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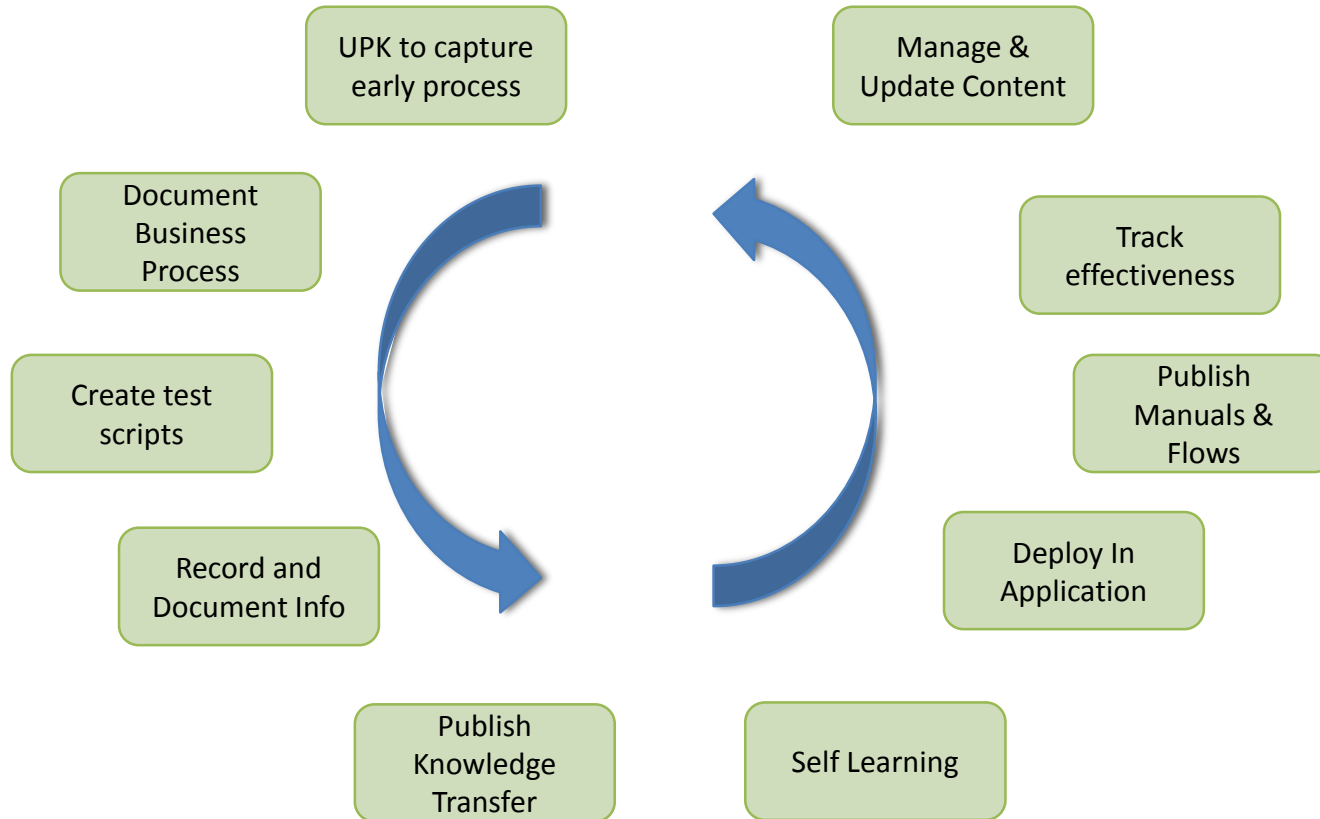
# Strategy

- Company/Department Adoption
- End User Adoption
- Enough Resources trained
- Timeframe
- Milestones
- Training Requirements

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# Lifecycle Knowledge



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# Reusable Material

Download more graphics at [www.psdgraphics.com](http://www.psdgraphics.com)

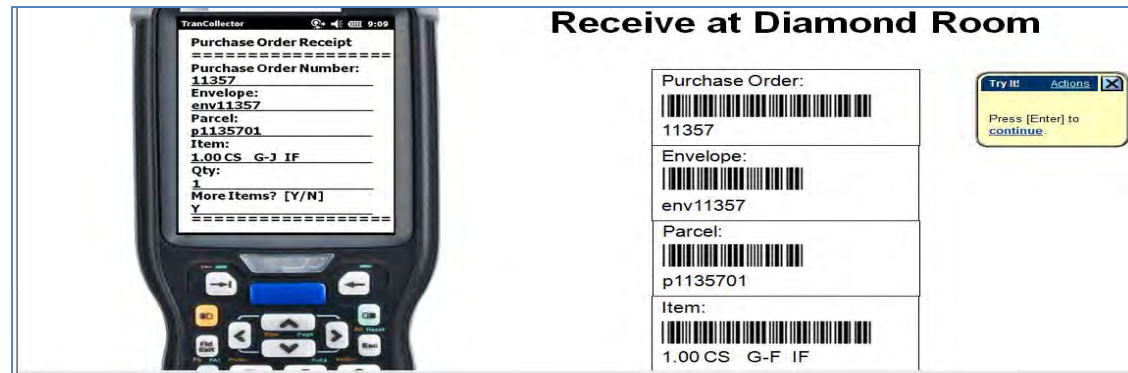


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# Creative Uses for UPK

- Images
  - Printer Instructions
- Links
- Warehouse System
- Medical Field
  - Diabetes Forum
  - Regulations



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# Not Enough Time?



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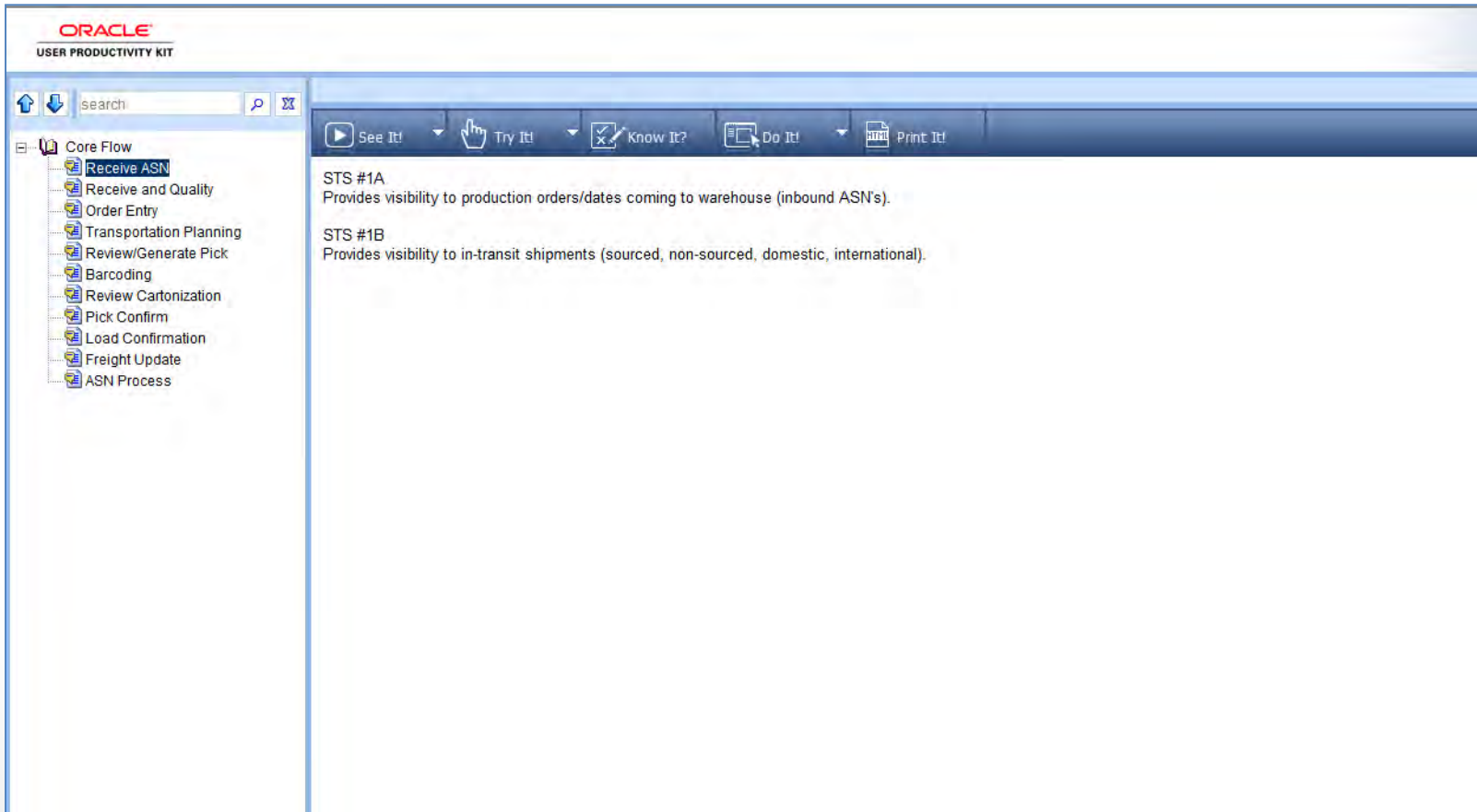
# UPK Scripts

- Interactive transactions simulations
- Web based training materials
- In-application performance support
- Creates user test scripts
- Tested before Go-Live

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# HTML Site



**ORACLE**  
USER PRODUCTIVITY KIT

search

Core Flow

- Receive ASN
- Receive and Quality
- Order Entry
- Transportation Planning
- Review/Generate Pick
- Barcoding
- Review Cartonization
- Pick Confirm
- Load Confirmation
- Freight Update
- ASN Process

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

**STS #1A**  
Provides visibility to production orders/dates coming to warehouse (inbound ASN's).

**STS #1B**  
Provides visibility to in-transit shipments (sourced, non-sourced, domestic, international).

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# UPK Modes

- See It!
  - Enables the user to learn an animated demonstration of the steps for a task being performed in a simulated environment. Such as moving the mouse and entering data, are all completed automatically.
- Try It!
  - Enables the user to learn interactively in a simulated environment. The user is prompted for mouse clicks and keystrokes.
- Know It!
  - Is an assessment type play back in which users are instructed to complete a particular task. The user will be scored on their accuracy.
- Do It!
  - This mode guides the user in the performance of actual task in a production environment and allows the user to learn by completing the actual task.



See\_It\_Mode.swf



Try\_It\_Mode.swf



Know\_it\_Mode.swf



Do\_It\_Mode.swf

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# Documentation – Complex Flows



# Training Manual

 ORACLE  
 USER PRODUCTIVITY KIT

 Training Guide  
 Accounts Receivable

## Accounts Receivable

### AR Setup

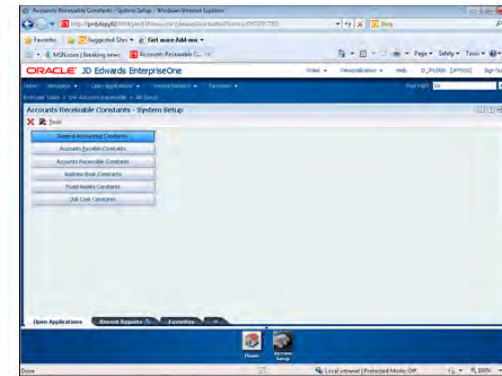
### Accounts Receivable Constants

### Procedure

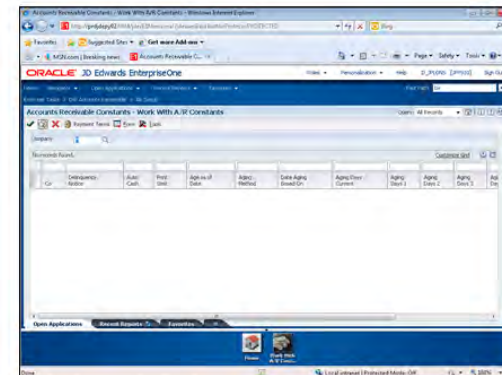


Step	Action
1.	Click the <b>Navigator</b> menu. <a href="#">Navigator</a>
2.	Click the <b>End-User Tasks</b> link. <a href="#">End-User Tasks</a>
3.	Click the <b>DW Accounts Receivable</b> link. <a href="#">DW Accounts Receivable</a>
4.	Click the <b>AR Setup</b> link. <a href="#">AR Setup</a>
5.	Click the <b>Accounts Receivable Constants</b> link. <a href="#">Accounts Receivable Constants</a>

 Training Guide  
 Accounts Receivable

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









Step	Action
6.	Click the <b>Accounts Receivable Constants</b> button. <a href="#">Accounts Receivable Constants</a>



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# Job Aid

Step	Action
1.	Click the <b>Navigator</b> menu. 
2.	Click the <b>End-User Tasks</b> link. 
3.	Click the <b>DW Accounts Receivable</b> link. 
4.	Click the <b>AR Setup</b> link. 
5.	Click the <b>Accounts Receivable Constants</b> link. 
6.	Click the <b>Accounts Receivable Constants</b> button. 
7.	Click the <b>Find</b> button. 
8.	Click the <b>00001</b> option. 
9.	Click the <b>Select</b> button. 
10.	Click the <b>Form</b> menu. 
11.	Click the <b>Payment Terms</b> menu. 
12.	Click the <b>Find</b> button. 
13.	Click the <b>Close</b> button. 
14.	<b>End of Procedure.</b>

## Overview

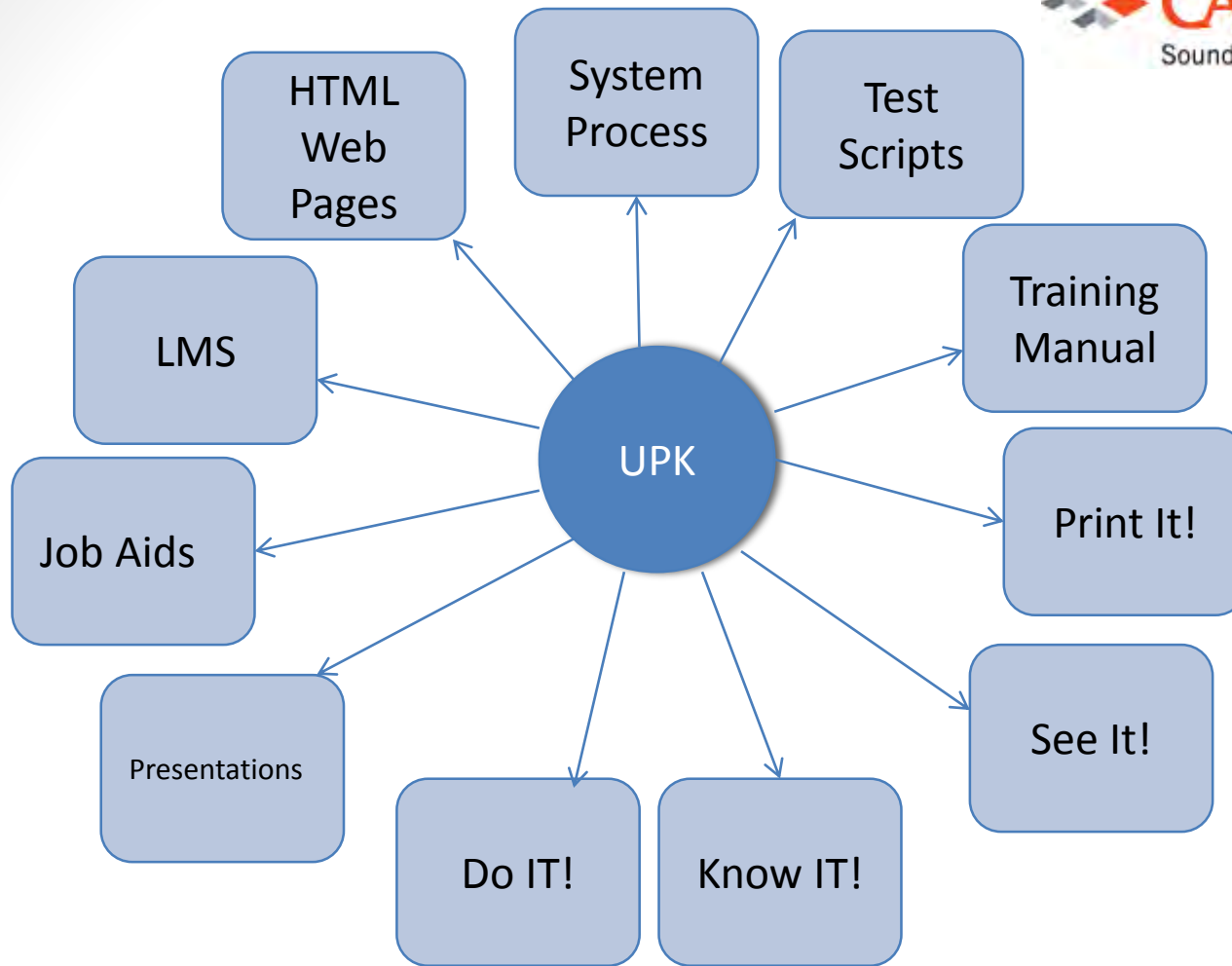
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# Test Case

Subject	Name	Test Step Number	Test Step Action	Test Step Expected Result	Creation Date
Accounts Receivable\AR Setup	Accounts Receivable Constants	1	Click the Navigator menu.		5/22/2013 4:48 PM
		2	Click the End-User Tasks link.		5/22/2013 4:48 PM
		3	Click the DW Accounts Receivable link.		5/22/2013 4:48 PM
		4	Click the AR Setup link.		5/22/2013 4:48 PM
		5	Click the Accounts Receivable Constants link.		5/22/2013 4:48 PM
		6	Click the Accounts Receivable Constants button.		5/22/2013 4:48 PM
		7	Click the Find button.		5/22/2013 4:48 PM
		8	Click the 00001 option.		5/22/2013 4:48 PM
		9	Click the Select button.		5/22/2013 4:48 PM
		10	Click the Form menu.		5/22/2013 4:48 PM
		11	Click the Payment Terms menu.		5/22/2013 4:48 PM
		12	Click the Find button.		5/22/2013 4:48 PM
		13	Click the Close button.		5/22/2013 4:48 PM
		14	End of Procedure.		5/22/2013 4:48 PM
Accounts Receivable\AR Setup	Automatic Acctg Accounting	1	Click the Navigator menu.		5/21/2013 5:41 PM
		2	Click the End-User Tasks link.		5/21/2013 5:41 PM
		3	Click the DW Accounts Receivable link.		5/21/2013 5:41 PM
		4	Click the AR Setup link.		5/21/2013 5:41 PM
		5	Click the Automatic Acctg Instructions link.		5/21/2013 5:41 PM
		6	Click the Form menu.		5/21/2013 5:41 PM
		7	Click the Multiple AAls menu.		5/21/2013 5:41 PM
		8	Enter the desired information into the Item No. field. Enter a valid value e.g. "R*".		5/21/2013 5:41 PM
		9	Click the Find button.		5/21/2013 5:41 PM
		10	Point to the End-User Tasks > DW Accounts Receivable > AR Setup object.		5/21/2013 5:41 PM
		11	Click the Cancel button.		5/21/2013 5:41 PM
		12	Double-click the Row:5 option.		5/21/2013 5:41 PM
		13	Point to the Item Number Company System Sequence No. Account CodesRequiredOpt object.		5/21/2013 5:41 PM
		14	Click the Accounts menu.		5/21/2013 5:41 PM
		15	Click the Find button.		5/21/2013 5:41 PM
		16	Click the Close button.		5/21/2013 5:41 PM
		17	End of Procedure.		5/21/2013 5:41 PM

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- One script produces many outputs

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# Pre-built Content

- **Reduces content creation time by Pre-built UPK Scripts**
- **Foundation**
  - Common Foundation
  - Address Book
- **Financials**
  - Account Payable
  - Accounts Receivable
  - General Ledger
- **Human Capital Management**
  - US Payroll
  - HR Benefits
- **Distribution**
  - Inventory
  - Purchasing
  - Sales Order
- **Manufacturing**
  - Product Cost
  - Manufacturing Accounting

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# Challenges

- Incomplete Interfaces/Data
- Roles
- Security
- System Downtime
- Lack of SME availability
- User Adoption
- Update Content
- Previous Versions

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# Thank You



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