

Integrating Tutor and UPK Content: A Complete User Documentation Solution

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TUTOR OR UPK?

Oracle has a robust set of user documentation tools supporting application adoption: Tutor and User Productivity Kit (UPK). Customers frequently ask what the strengths and uses of these tools are. The goal of this paper is to explain:

- The various user documentation types
- User documentation created with Tutor
- User documentation created with UPK
- The timing of user documentation development

Once these points are understood, it becomes clear that companies who implement and use any of the Oracle business applications can benefit from using Tutor and UPK together. Their end users will be prepared to do their jobs correctly with the new applications when they go live.

KBACE Technologies uses Oracle's Tutor and UPK to quickly create user documentation supporting an effective adoption process during the implementation of Oracle Applications. By greatly streamlining the documentation effort, these two tools give KBACE the ability to develop accurate training material throughout the Conference Room Pilot process. Our customers become productive in the new applications quickly, and are given the ability to maintain the user materials for performance support long after go live.

**Don Kisiday
Senior Vice President of Consulting Services, KBACE Technologies.**

INTRODUCTION

User documentation is defined as content that guides employees of organizations to perform their work in the authorized way . User documentation includes processes (business flows), procedures, instructions, system instructions, system navigation transaction recordings, training presentation materials, and support documents. The *Tutor Implementation Guide* describes in more detail the differences between each of these document types.

Why Create User Documentation?

Accurate and consistent user documentation supports an organization's ability to successfully implement, use, and maintain its business applications. Ultimately, user documentation is a productivity enhancement. Organizations can employ effective user documentation to help address the following:

- Increase staff productivity
- Implement new or upgrade existing applications
- Reengineer or improve business practices
- Train new hires or new users

- Support users in a production environment
- Deploy company standards, codes of conduct, and ethical practices
- Comply with regulatory/quality programs (Sarbanes-Oxley, ISO 9000, etc.)
- Reduce audit costs

ORACLE SOLUTION

For companies wishing to relieve these business pressures, Oracle offers a solution that streamlines the creation of the various types of user documentation. The solution comprises Oracle Tutor and UPK, which are product agnostic and can be used by companies who use any of the Oracle business applications.

Oracle Tutor

Tutor provides content and software tools to easily modify, create and maintain written business process documentation – business flows, policies, procedures, and support documents. This process documentation contains the type of information ISO 9000 and SOX auditors require when certifying companies who are trying to achieve compliance in these areas. Tutor documents are deployed as HTML sourced from a server environment for training, or from the application environment as living productivity aids.

User Documentation created with Tutor (people to people):

- Business Flows (cross-functional sequences of procedures)
- Procedures (multi-role work instructions)
- Instructions (single-role work instructions)
- Support documents (reference documents and form abstracts)

Oracle UPK

UPK picks up where Tutor leaves off, providing content and software tools to capture and play back the exact steps a user would use to enter data in a formal business application. For online training, users can use the transaction recording playback to be trained and tested on their understanding of how to complete system transactions that are part of their daily job. UPK content may be linked from Tutor procedures for live, in context, performance support.

User Documentation created with UPK (people to system):

- System Transaction Recordings (data entry and other steps an individual performs in an application)
- Job aids / Navigation instructions
- Classroom Training Guides
- Web Based Training

- User acceptance test scripts

DEVELOPING TUTOR AND UPK CONTENT

User documentation is a critical deliverable of an application implementation, used to train employees in the correct use of systems. The next few paragraphs define some common implementation activities, the people resources required, and the timing of the development of the user documentation.

Implementation Activities

A key element of any Application implementation is the development of the future state model. This prototype is achieved by working through the implementing organization's business requirements in an applications environment. Oracle Unified Method (OUM) refers to this as a solutions workshop, or Conference Room Pilot (CRP). Workshops typically include the following approaches to business processes and data:

- 1: Oracle business processes, Oracle data.
- 2: Oracle business processes, implementing organization data.
- 3: Implementing organization business processes & data.
- UAT: User acceptance testing (via test scripts).

Oracle has found that the best practice approach to developing user documentation is to integrate its development with the solutions workshop cycle. As the applications functional specialists work together with the implementing organization business specialists, the approved use of the new application is developed. When this use is documented during CRP, accurate, detailed, and appropriate work instructions are the result. Well written user documentation developed in conjunction with the future state model is the most effective tool to train employees how to do their jobs with the new applications.

User Documentation Team Members

To create quality user documentation, it is important to assemble an effective documentation team. Choose a strong Project Leader and staff the documentation team with management members from cross functional groups. Make sure team members have the responsibility – and the authority – to make things happen.

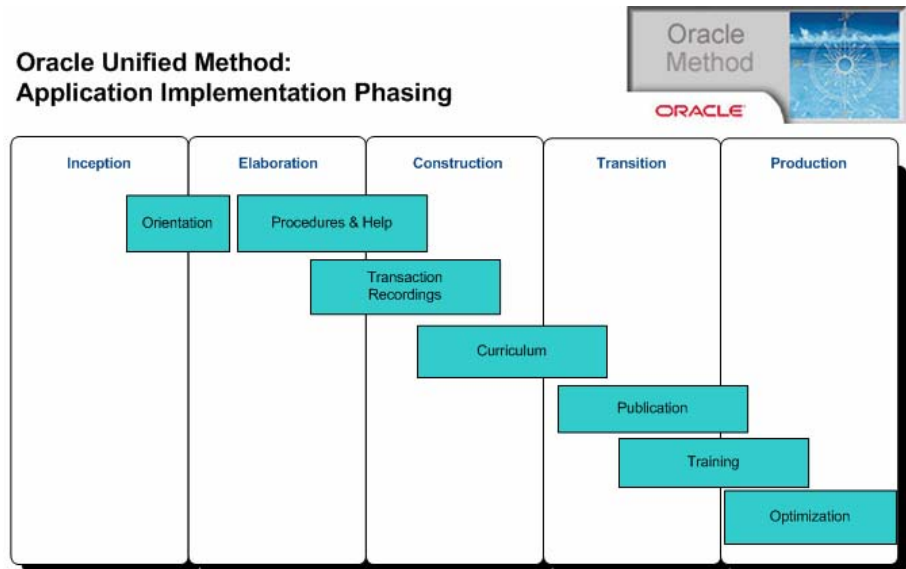
The winning team should consist of the following roles:

- Documentation Project Manager
- Document Owners (one for each functional area)
- Document Controller

The *Tutor Implementation Guide* has complete job descriptions for these roles.

When to Create the Appropriate User Documentation

The diagram below shows when to create the various user documentation types within the framework of an OUM applications implementation project. Note that using the Tutor Model Documents and UPK pre-built content during the Orientation is an excellent way to introduce the project team to high quality deliverables. In addition, the UPK content gives the organization team members a way to try out the applications without requiring an installed instance.



Best practice is to develop and refine user documentation types throughout the workshop cycles and to refine and publish into the transition phase. Procedure content benefits from refinement during each CRP cycle, while UPK content is best developed once organization specific data is available to the developers. The combination and integration of user documentation created by Tutor and UPK can then be used to train the user community at go-live and beyond.

The *Tutor Implementation Guide* contains extensive information on this best practice methodology of creating the appropriate user documentation.

CONCLUSION

Because of the different user documentation types required in an implementation (and for on-going use), Tutor and UPK offer organizations a documentation solution with no overlap in content. Using the tools together streamlines the documentation effort for any company needing to provide a complete user documentation solution for their employees.



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