

ORACLE TUTOR CONTENT: PROCESS DOCUMENTATION

WHY IS PROCESS DOCUMENTATION SO IMPORTANT?

TUTOR PROCESS DOCUMENTS (POLICIES AND PROCEDURES):

- Help solve critical software implementation issues
- Are complete documents, including flowcharts
- Are easy to customize to reflect your business practices
- accelerate the writing process (you don't start with a blank screen)
- are fully integrated (e.g. purchasing is mapped to AP)
- reflect a standard, easy-to-read format

Oracle Tutor is used to develop end user documentation and training materials. As a documentation tool, it is unparalleled for Oracle implementations, partly because of its integration with AIM and Oracle Business Models, but also because of the large volume of model documents available for core Oracle Applications. As an implementation tool, Tutor can be instrumental in a migration from a legacy system to Oracle Applications, an upgrade to newer releases of Oracle Applications, or a stand-alone documentation method for procedure and process changes for formal regulatory requirements such as ISO9000, Sarbanes-Oxley, HIPPA, and SAS70. As a document delivery tool, Tutor can be fully integrated within a company's paper- or browser-based standards, making it fast and easy to update information when changes are required.

Model Documents

Tutor model documents are comprehensive process and courseware documents that cover a vast majority of core business activities and reflect generally accepted business practices. They are not just templates. This substantial repository of model documents provides a starting point -- document "owners" edit the models instead of creating documents from scratch.

Process Documentation

Tutor process documentation consists of over 25 business process flows, over 250 procedures, plus 260 support documents (forms, instructions, and reference documents.) This integrated repository of model operating procedures covers business activities such as Accounts Payable, Accounts Receivable, Cost Accounting, Credit & Collections, Customer Service, Engineering, Fixed Assets, General Ledger, Human Resources, Information Services, Inventory Control, MRP, Process Manufacturing, Production Control, Product Marketing, Purchasing, and Quality.

Why is process documentation so important?

Process documentation plays a critical role in the growth of any company. Without standard methods for implementing procedures, a company will soon find that expansion brings complications that can literally be crippling. Establishing standard processes, particularly to meet out side regulatory requirements (such as ISO9000 and Sarbanes-Oxley), through the use of model documents and flowcharts is simply not optional. It must be done.

Business Process and Sub Process content

- All Processes > Top Level
- Getting Started > Author to Publish Tutor Documents
- Process > Campaign to Cash
- Process > Contract to Renewal
- Process > People to Paycheck
- Process > Procure to Pay
- Process > Project to Profit
- Process > Period End Close to Financial Reports
- Process > Receive Asset to Depreciation
- Process - Audit to Maintain Process Documents
- Sub Process > Campaign to Quote
- Sub Process > Invoice to Cash
- Sub Process > Order to Invoice
- Sub Process > Quote to Order
- Sub Process > Benefits Review to Compensation
- Sub Process > Benefits Review to Payroll
- Sub Process > Corrective Action to Termination
- Sub Process > Employee Review to Compensation
- Sub Process > Leave of Absence to Replacement
- Sub Process > Month End Benefits to Payroll
- Sub Process > Recruit to Hire
- Sub Process > Employee Resignation to Replacement
- Sub Process > Staff Reduction to Payroll
- Sub Process > Payroll to Payment
- Sub process > Analyze to Agreement
- Sub Process > Inspection to Disposition
- Sub Process > Requisition to Receipt
- Sub Process > Supplier Return to Debit
- Sub Process > Supplier Invoice to Payment
- Sub Process > Supplier Return to Replacement
- 1 Process Map for Document Controller

Accounts Payable Procedures

- Accounts Payable - Default Accounts
- Accounts Payable - Bank Accounts
- Accounts Payable - VAT Designations
- Accounts Payable Mail Processing
- Clearing Supplier Payment Holds
- Entering Check Requests
- Entering Expense Reports
- Entering Supplier Invoices
- Entering Recurring Invoices
- Approving Employee Expense Reports
- Resolving Invoice Holds
- Recording Debit Memos for Returns
- Processing Credit Memos from Suppliers
- Computer-Generated Payment Batches
- Processing Manual Checks
- Accounts Payable Period End Close
- Accounts Payable Period End Reconciliation
- 1099 Processing
- Invoices for Nonproduction Purchases
- Check Requests
- Petty Cash Requests
- Creating Single Payments
- Adding Suppliers
- Changing Supplier Data
- Supplier Interaction

Accounts Receivable Procedures

- Accounts Receivable - Tax Codes
- Accounts Receivable - Credit Reason Codes
- Invoicing
- Miscellaneous Invoicing
- Accounts Receivable Mail Processing
- Approving Restrictive Endorsement Receipts
- Customer Receipts - Bank Deposits

- Customer Receipts - Cash Application
- Customer Receipts - Unidentified Cash
- Customer Receipts - Cash Application Adjustments
- Entering and Changing Credit Memos
- Accounts Receivable Period End Close
- Accounts Receivable Period End Reconciliation
- Sales Tax Reporting
- Collections
- Invoice Corrections
- Customer Debit Memos
- Accounts Receivable Write Offs
- Periodic Credit Review
- Special Credit Review
- Credit Balances and Refunds
- Granting Credit/Establishing Limits
- Placing Customer Credit Holds
- Reviewing/Releasing Customer Credit Holds
- Reviewing/Releasing Credit Holds on Sales Orders
- Adding Customers
- Changing Customer Data

Cost Accounting Procedures

- Verifying All Items Have Standard Costs
- Verifying Entry of All Current Period Transactions
- Verifying Item Usage
- Researching Negative On-Hand Inventory Balances
- Verifying All Assemblies Have Bills of Material
- Inventory Period End - Account Reconciliations
- Inventory Period End - Other Journal Entries
- Inventory Period End

Document Control Procedures

- Modifying a Process Document
- Auditing Process Documents
- Adding a Process Document
- Getting Started - Implementing Tutor

- Building a Student Guide by Job Title
- Building a Student Guide by Topic
- Publishing the Initial Release of Process Documents
- Updating Tutor Manuals
- Tracking Editing Workshop Documents

Engineering Procedures

- Requesting an Engineering Change
- Evaluating an Engineering Change Request
- Evaluating Engineering Change Orders
- Resubmitting an Engineering Change Order
- Implementing an Engineering Change
- Bill of Material Maintenance
- Routing Maintenance
- Requesting an Engineering Item Addition
- Processing an Engineering Item Addition
- BOM Maintenance in an Engineering Change Organization
- Creating an Engineering Change Order
- Requesting an Item Addition/Deletion
- Processing an Item Addition/Deletion
- Assembly Process Change

Fixed Assets Procedures

- Fixed Asset Request
- Fixed Asset Approval - Executive Staff Review
- Fixed Asset Purchase
- Fixed Asset Recording
- Fixed Asset Transfer
- Fixed Asset Loss, Destruction, or Theft
- Fixed Assets Period End
- Fixed Assets Period End Reconciliation
- Fixed Asset Disposal
- Fixed Asset Inventory

General Ledger Procedures

- General Ledger Chart of Accounts Maintenance
- Updating Financial Statement Formats

- Maintaining the Standard Journal Entry Log
- Establishing the Close Schedule
- Monitoring the Close and Avoiding Delays
- Processing Subledger Data to the General Ledger
- General Ledger Period End Close - Adjustments
- Processing Allocations and Periodic Entries
- Processing Reserves, Reversals and Clearing Suspense
- Processing Manual Journal Entries
- Petty Cash Reconciliation
- Other Accounts Reconciliation
- Cash Transfers
- Creating Budget Journal Entries
- Transferring Budget Amounts
- Creating Manual Encumbrance Journal Entries
- Relieving Manual Encumbrances
- Maintaining Foreign Currency Rates
- Completing the Period End Close
- Creating Budget Formulas and Allocations

Human Resources Procedures

- Initiating Personnel Requisitions
- Processing Personnel Requisitions
- Internal Job Postings
- Employee Referral Program
- New Employee Processing
- Answering Benefits Questions
- COBRA Administration
- Training Needs Assessment
- Job Evaluation
- Employee Performance Review
- Employee Performance Corrective Action
- Employee Termination
- Changing Employee Information/Status
- Annual Compensation Review
- Human Resource Reporting

- External Applicant Processing
- Relocation
- Hiring Temporary and Contract Personnel
- Processing Salary Actions and Promotions
- Staff Reduction and Outplacement
- Benefits Administration
- Processing Employee Benefit Changes
- Human Resources Records Maintenance
- Annual Benefits Review
- Annual Verification of Employee Information/Status
- COBRA Month End Processing
- Bereavement Leave
- Jury Duty Service Leave
- Severance Benefit Program
- Personal/Family Leave of Absence
- Medical Leave of Absence
- Educational Assistance
- Annual Employee Benefit Review - Open Enrollment
- Bonus Processing
- Biannual Stock Option Processing
- Maintain Payroll Transactions
- Confirm Payroll Readiness
- Calculate, Validate, and Balance Payroll
- Manage Payment Distribution
- Perform Payroll Accounting

Inventory Procedures

- Receiving Material from Other Buildings
- Issuing Discrete Job/Repetitive Schedules Material
- Filling Discrete Job/Repetitive Schedules Shortages
- Issuing Unplanned Material
- Issuing Production Material to Suppliers
- Transferring Material - Nonproduction Use
- Obsolete Material
- Transferring Discrepant Stockroom Material

- Stock to Stock Transfers
- Scrap
- Cycle Counting
- Receiving Inspection
- Moving Material from Receiving Inspection to MRB
- Moving Material from Receiving Inspection to Stock
- Inspecting Returned/Rejected Materials
- Inspecting Completed Assemblies
- Quality Inspection Using Inspection Suppliers
- Moving Material from Quality Inspection to MRB
- Moving Material from Quality Inspection to Stock
- Material Review Board (MRB)
- Moving Material from MRB to Stock
- Moving Material from MRB to the Scrap Bin
- Returning Material to Suppliers from MRB
- Consigning Material to Rework Suppliers from MRB
- Requesting Corrective Action
- Initiating Corrective Action
- Implementing Corrective Action
- Defining an ABC Analysis
- Conducting a Physical Inventory
- Miscellaneous Transactions
- Miscellaneous Shipments
- Receiving Customer Returns
- Shipping Sales Orders
- Freight Carrier Maintenance
- Refusing, Accepting, or Rejecting Deliveries
- Receiving Supplier Material
- Monitoring Impounded Material
- Releasing Impounded Material
- Receiving Inspection Using Inspection Suppliers

Information Systems Procedures

- Communicating through a Disaster
- Assessing Business Risk

- Managing Changes within IT Environments
- Disaster Recovery - Business Continuity Planning
- Managing Incidents and Problems
- Managing Capacity and Planning
- Managing Command Center Escalations
- Resolving Support Issues for Outsourcing Customers
- Declaring and Initiating Disaster Recovery

Order Management Procedures

- Customer Interaction
- Customer Service Holds
- Customer Service Mail Processing
- Submitting Sales Order Documentation
- Issuing Price Quotations
- Issuing Delivery Quotations
- Changing Quotations
- Canceling Expired Quotations
- Entering and Verifying Sales Orders
- Converting Quotes to Sales Orders
- Scheduling Sales Order Ship Dates
- Sales Order Acknowledgment
- Sales Order Changes/Cancellations
- Resolving Sales Order Holds
- Issuing Returned Material Authorizations
- Correcting Returned Material Authorizations
- Inspecting Returned Product
- Order Management Period End
- Sales Commission Processing
- Picking and Staging Sales Orders
- Printing Sales Order Pick Lists
- Product Marketing - Priority Codes
- Product Marketing - Territory Codes
- Adding Price Lists
- Maintaining Price Lists
- Maintaining Price Discounts

- Maintaining Agreements
- Maintaining GSA Contract Prices
- Resolving Product Problems
- Servicing Returned Products
- Planning Trips and Deliveries

Project Accounting Procedures

- Setting Up A New Project
- Modifying An Existing Project
- Creating and Submitting a Time Sheet
- Generating Project Invoices
- Processing Supplier Invoices for Projects
- Analyzing Project Information and Taking Action
- Running Weekly and Monthly Close Processes
- Closing Projects and Tasks

Planning Procedures

- Publishing the Master Production Schedule
- Updating the Master Production Schedule
- Material Requirements Planning
- Corporate Sales Forecast

Purchasing Procedures

- Requesting Material and Services
- Selecting a Supplier
- Issuing a Purchase Order
- Changing a Purchase Order
- Resolving a Receiving Discrepancy
- Evaluating Supplier Performance
- Adding Suppliers to the Approved Supplier List (ASL)
- Deleting Suppliers from the Approved Supplier List (ASL)
- Changing Approved Supplier List Item Data
- Issuing Requests for Quotation

WIP Procedures

- Releasing Discrete Jobs/Repetitive Schedules
- Identifying Shortages
- Preventing Purchase Item Shortages

**KNOW MORE, DO MORE,
SPEND LESS****CUT YOUR PROCESS
DOCUMENTATION COSTS
BY UP TO 85% WITH
ORACLE TUTOR**

Whether you're rolling out Oracle Applications to experienced users or training new hires, Oracle Tutor provides a solution that brings together Oracle's process knowledge base with your company's own policies and procedures.

- Create and document custom business procedures for the tasks your users perform in a fraction of the time it would take to develop them from scratch.
- Develop courses tailored to your company's specific needs.
- Update procedures online and use the Web to distribute reference materials only to the users who need them.
- Guide your employees through all relevant business scenarios with Oracle Tutor's graphical decision-support procedure representation

RELATED PRODUCTS:

- User Productivity Kit (UPK)
- Internal Controls Manager (ICM)
- Learning Management

RELATED SERVICES

Oracle University Tutor Implementation Engagements:

- Orientation Workshop
- Procedure Editing Workshop
- Author & Publisher Training
- Courseware Editing and Creation

- Preventing Manufacture Item Shortages
- Managing Actual Shortages
- Changing Released Discrete Jobs/Repetitive Schedules
- Discrete Job Completion
- Performing Rework
- Production Activity Control
- Printing Shop Packets
- Moving Material from MRB to Rework
- Operation Completions
- Moving Completed Assemblies to Stock or Inspection
- Returning Components to Stock
- Rejecting Discrepant Assemblies
- Rejecting Discrepant Components

Jumpstart your process documentation effort

Tutor model process documents are supplied to customers as baseline material. The process document models are not intended to be used as-is. The expectation is that each customer will modify them to reflect the actual business process to be deployed at their site. While covering a large portion of standard business processes described by Oracle Applications, Tutor model process documents do not claim to cover the Applications completely and are written at a level above the applications "point" or "family pack" releases. Unlike the courseware documents, the process model documents do not reflect Applications point or family pack releases, though customers may certainly add point or family pack details as they modify the process document models. Tutor model process documents provide significant value to customers as both models of well-developed procedures and as an accelerant in developing customer specific documents. Additionally, these core procedure models are intended to assist the process owners in learning how to write a good procedure. Then, the Tutor tools assist in easily creating the additional content needed.

System Requirements

System Requirements for Oracle Tutor are on the last pages of the main Tutor Data Sheet. http://www.oracle.com/applications/tutor/ds_tutor.pdf

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