

# JD EDWARDS UPK PRE-BUILT CONTENT FOR: ENTERPRISEONE 9.0



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 JD Edward's applications.

UPK application specific content created by Oracle is released in English and updated with each major release of the application, documenting best practices for that release 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:

### Fundamentals

Basic Skills and Navigation

Help and Other Assists

Working with Grids

Working with Records

Working with Media Objects

Working with Reports

Working with Messages and Queues

Understanding Processing Options

### Accounts Receivable

Setting Up the Accounts Receivable System

Entering Customer Information

Entering Invoices

Processing Recurring Invoices

Working with Unposted Invoices

Processing Invoices

Working with Posted Invoices

Processing Batch Invoices

Using the Customer Ledger Inquiry

Using the Speed Status Change Program

Entering Standard Receipts

Entering Standalone Receipts

Entering Speed Receipts

Working with Receipts

Processing Receipts

Processing Automatic Receipts

Processing Accounts Receivable Drafts  
Processing Automatic Debits  
Managing Deductions  
Processing Statements  
Managing Credit and Collection Information  
Processing Delinquency Notices and Fees  
Updating Accounts Receivable Statistics for Customer Analysis  
Working with AR Netting  
Processing Credit Reimbursements  
Using AR Reports  
Working with Multi-Currency for Accounts Receivable

### **Advanced Pricing**

Understanding Advanced Pricing  
Setting Up Base Pricing  
Setting Up Advanced Pricing  
Using Advanced Preferences for Pricing  
Creating Price Adjustments  
Managing Pricing  
Repricing Orders

### **Advanced Real Estate Forecasting**

Uploading Unit Master Information  
Setting Up the Advanced Real Estate Forecasting System  
Setting Up Unit Assumptions  
Setting Up Constants  
Setting Up Unit Master Information  
Setting Up Account Status Information  
Setting Up Sales Overage Forecasting  
Setting Up Expense Participation Forecasting  
Generating Budget Forecast Amounts

### **Blend Management**

Understanding Blend Management  
Setting Up Blend Management  
Defining Lot Attributes

Defining Configured Grid Columns

Setting Up Vessels

Setting Up Configured Operations

Using Different Methods to Enter Operations

Entering Receiving Operations

Entering Move Operations

Entering In-Place and Administrative Operations

Entering Removal Operations

Managing Blend Operations

Managing Spirit Operations

Managing Container Operations

### **Configurator**

Understanding Configuration

Understanding the Prerequisites and Setup Steps for Implementing Configurator

Setting Up Configurator Constants

Creating Configured Item Segments

Entering Cross-Segment Editing Rules

Entering Assembly Inclusion Rules

Managing Configured Tables

Managing Media Objects

Understanding Configured Item Orders

Managing Configured Item Revisions

Explaining Configured Item Features

Examining Configured Items and Manufacturing

Understanding Configured Items and Distribution

Demonstrating Kit Processing

### **Fixed Assets Accounting**

Understanding Fixed Assets

Setting Up the System Foundation

Setting Up System Components

Setting Up User-Defined Depreciation

Entering Asset Master Records

Managing Asset Master Records

Tracking and Relocating Assets

Processing Journal Entries  
Reviewing Asset and Maintenance Costs  
Updating Units of Production Schedules  
Calculating Asset Depreciation  
Splitting Assets  
Transferring Assets  
Disposing of Assets  
Revaluing Assets  
Verifying Data Integrity  
Running Year-End Processes  
Running Global Updates for Asset Information  
Running Global Updates for Accounts and Ledgers  
Purging Assets and Asset Information

### **Homebuilder Management**

Setting Up the Homebuilder Management System  
Setting Up Homebuilder Management Information  
Entering Bid Contracts and Takeoffs  
Processing the Sale of a House  
Running the Lot Start Process  
Creating Lot Commitments  
Creating Vouchers

### **Inventory Management**

Understanding Inventory Management  
Setting Up the Inventory Management System  
Setting Up Location Information  
Entering Branch/Plant Information  
Entering Item Information  
Working with Kits  
Working with Inventory Transactions  
Locating Items and Quantities  
Working with Transaction Records  
Processing Cycle Counts  
Processing Tag Counts  
Describing System Purges and Updates

### **Manufacturing – Product Data Management**

Understanding JD Edwards EnterpriseOne Product Data Management

Setting Up Product Data Management

Managing Bills of Material

Setting Up Work Centers

Managing Routings

Calculating Lead Times

Setting Up Repetitive Manufacturing

Setting Up Process Manufacturing

Using Engineering Change Management

### **Manufacturing Management Discrete Shop Floor Management**

Understanding JD Edwards EnterpriseOne Shop Floor Management for Discrete Manufacturing

Setting Up JD Edwards EnterpriseOne Shop Floor Management for Discrete Manufacturing

Setting Up Constants for Discrete Manufacturing

Setting Up Product Data for Discrete Manufacturing

Creating Discrete Work Orders

Working with Discrete Work Orders

Working with Commitments for Discrete Work Orders

Working with Availability and Shortages for Discrete Work Orders

Working with Issues and Material Movement for Discrete Work Orders

Working with Hours and Quantities for Discrete Work Orders

Working with Completions for Discrete Work Orders

Managing Discrete Work Order Information

### **Procurement and Subcontract Management**

Describing JD Edwards EnterpriseOne Procurement

Setting Up the JD Edwards EnterpriseOne Procurement System

Setting Up Product Information

Setting Up Supplier Information

Entering Stock Purchase Orders

Entering Nonstock Purchase Orders

Processing Requisitions

Processing Quote Orders

Processing Approvals  
Processing Blanket Orders  
Processing Receipts for Stock Purchase Orders  
Managing Procurement Information  
Routing Receipts  
Using Three-Way Voucher Match  
Using Two-Way Voucher Match  
Using the Evaluated Receipt Process  
Managing Suppliers  
Purchasing for Subcontract Management  
Purging Data  
Running Reports

### **Real Estate Management**

Setting Up the Real Estate Management System  
Setting Up Facility Information  
Setting Up Lease Information  
Setting Up Manual and Recurring Billings  
Completing the Billing Process  
Processing Receipts  
Processing Security Deposits  
Processing Tenant Work Orders  
Processing Sales Overage  
Forecasting Sales  
Working with Gross Lease Occupancy Information  
Expense Participation-Setting Up Expense Participation  
Expense Participation-Setting Up Class Exposure Adjustments  
Expense Participation-Setting Up Tenant Area Adjustments  
Expense Participation-Setting Up Building Area Adjustments  
Expense Participation-Processing Expense Participation  
Processing Escalation Billings  
Processing Revenue Fees  
Processing Fees and Interest  
Processing FASB 13 Information  
Projecting Rent

## **Sales Order Management**

Setting Up the Sales Order System Foundation

Describing Product Information

Defining Customer Information for Sales

Setting Up Pricing Information

Entering and Managing Sales Orders

Creating Order Acknowledgments and Picking Documents

Confirming Order Shipments and Generating Shipping Documents

Printing Invoices

Performing End-of-Day Sales Update

Processing Direct Ship Orders

Processing Transfer Orders

Processing Intercompany Orders

Processing Credit Orders

Processing Returned Material Authorizations

Processing Quote Orders

Processing Blanket Orders

Processing Recurring Sales Orders

Processing Backorders

Applying and Releasing Order Holds

Creating and Using Templates to Enter Sales Orders

Setting Up and Processing Kit Items

Using Customer Segment Based Selling

Defining Item Cross-References

Applying Print Messages

Setting Up Flexible Sales Commissions

Approving and Logging Changes to Sales Orders

Updating Prices for Sales Orders

Processing Prepayments

Describing Advanced Preferences

Describing Reposting and Purging Information

Reviewing Sales Order Reports and Inquiries

## 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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