Oracle Tutor and UPK: Achieving a Superior Ownership Experience

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Create end-user process and training documentation to
- reduce costs
- reduce risk
- enhance the user experience
- improve user productivity

EXECUTIVE OVERVIEW

Business Problem: A key condition of achieving a superior ownership experience is to ensure that employees know how to use business applications effectively to perform their jobs when the applications go live. Lack of accurate and consistent process, procedure, and training documentation can detract from an organization's ability to successfully implement, use, and maintain its business applications.

By documenting processes, procedures, and training materials, companies can ease the following business pressures, taking them a giant leap closer to Superior Ownership Experience (SOE):

- Implement new or upgrade existing applications
- Reengineer or improve business practices
- Train new hires or new users
- Support users in a production environment
- Increase staff productivity
- Develop and deploy company standards, codes of conduct, ethical practices, and statutory and regulatory policies
- Comply with regulatory/quality programs (Sarbanes-Oxley, ISO 9000, etc.)
- Reduce audit costs

Oracle Solution: There are two Oracle products that provide value throughout the software lifecycle. These products help companies maximize their applications investment by providing customizable business process and system transaction documentation for self paced learning and production environment user support. Tutor and UPK provide the content and tools that enable companies to modify prewritten procedures and self-paced learning materials to reflect an organization's specific business practices and application environment as well as easily create and deploy custom content. Also important, Tutor and UPK tools streamline the creation and maintenance of end-user process and training documentation. These two products can be used with all of the Oracle Applications to prepare employees to be Productive Day One.

Achieve Superior Ownership Experience throughout the application life cycle
- Implementing applications
- Using applications
- Managing applications

INTRODUCTION

Tutor and UPK are complementary products that can be used right now. Both tools are product agnostic and can be used by companies who use any of the Oracle Business applications (EBS, PFST, JDE, Siebel, etc)

- Tutor's strength is in providing content and software tools to easily modify, create and maintain business process documentation – policies, procedures, and support documents. Tutor process documentation covers the type of information that ISO 9000 and SOX auditors require when certifying companies who are trying to achieve compliance in these areas.
- 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 in the form of an annotated transaction recording. System transaction documentation, job aids, user acceptance test scripts, instructor led and online training, and online performance support are valuable content pieces that can all be created from one recording. As part of online training, users can use the transaction recording playback to be trained and tested on their understanding of how to complete activities that are part of their daily job.

Tutor

Tutor is an authoring and publishing tool combined with a repository of business procedures and support documents that focus on the human component of the applications implementation. Serving as the bridge between implementation project teams and end-users, Tutor makes it easier to quickly create, customize and maintain process documentation and reference materials for a wide range of applications. Tutor transforms what was once a time-consuming task into a simple editing exercise. Rather than documenting future business practices from scratch, Tutor's model documents provide your implementation project team with a time saving springboard. Using Tutor to document key business practices and build job-role related procedure and reference materials, you'll be better prepared to transition the applications to your end-users.

UPK

The User Productivity Kit is a complete instructional design development tool for all Oracle business applications. Organizations can quickly create the critical system transaction training and support materials needed to drive project team and user productivity throughout the lifecycle of the software. A repository of system transaction content is also provided for many of the applications. With the UPK Developer tool, organizations can create system transaction documentation, user acceptance test scripts, comprehensive instructor led training materials, web-based training materials, and provide post go live performance support.

IMPLEMENTING APPLICATIONS

"In terms of cost savings, centralized management of documentation, easy manageability, improved operational efficiencies and leveraged user skills, Oracle Tutor has been wonderful."

— Coy Sable, Brunswick Communications Team Leader

Tutor

When implementing new applications, companies must define their high-level business practices to determine what features of the applications they wish to implement. Tutor is unparalleled for application implementations because of the large volume of model procedure documents available for core business applications. A company simply designates various process owners to modify the model procedures to reflect their business practices. When modifying procedures in a workshop environment, process owners can collaborate on critical issues and resolve implementation issues in a timely manner.

UPK

Once a company has defined the higher-level business practices and the application features that will be used to streamline the business activities, the next step is to define how end-users should use the system.

"We've cut our development time by 60 to 70 percent. And in terms of ongoing maintenance, it's so easy to come back and update content in a single source if a field changes or a customization is put in."

— MaryEm Musser, Center for Professional Development, Assistant Director, BDO Seidman, LLP

During implementation, UPK Developer can be used on a test instance to capture the various steps an application user would go through to enter and complete a transaction in the application. The output from UPK Developer can be exported into Mercury Quality Center, to create system process test scripts of the pre go live applications. If the company has customized the applications, UPK Developer will capture that information as well.

To train end-users on the system transactions, people learn in various modes. Organizations may base all of their training online, they may lean toward Instructor Led training in a classroom setting, or they may train their users through a combination of both methods. Once the transactions have been captured, the UPK Developer can publish output for these various learning styles. Web based training is enabled via the UPK Player. The 'player' output allows the end-user to watch that transaction in three modes: see it (playing back a simulated movie to get users accustomed to the new process), try it (getting the user to initiate the steps to the new process), and know it (certifying that the users indeed know the proper steps to the new process). Instructor Led training, including both instructor and student guides for a traditional classroom environment, can also be created from the same initial recording. The 'job aid' output is a traditional MS Word document with point and click instructions and embedded screen shots.

To ensure users know how to use the system before go live, UPK has a 'know it' mode that tests/certifies the users understanding in a simulated environment. With test mode, companies can ensure their users know how to use the application correctly before go live.

Superior Ownership Experience

When it is fast and easy for organizations to create custom procedures and system transaction training materials targeted for their end-users, implementation time

frames and mistakes are vastly reduced. A smooth implementation achieves the first step in Superior Ownership Experience.

USING APPLICATIONS

Tutor

Once the business applications have been implemented, it is important for employees to have easy access to their end-user documentation. Tutor allows employees to access their process and training documentation by job role via the organization's intranet. They simply navigate to a designated landing page on the company intranet with a list of the company job roles. When they click on their specific role, a list of the documents relevant to their job is displayed. Employees no longer need to scan through hundreds of document titles or do a search that returns hundreds of possibilities. When writing the process documentation, the corresponding UPK content can be referenced at the appropriate point within the procedure for quick drill down access to the detailed transactions steps.

UPK

In addition to being made available on-line at the appropriate point in a procedure, UPK content can also be linked to the application online help so end-users may have support while they are completing the actual transaction. This is called performance support or the 'Do It' mode. At the same, the use can work in the actual application and watch the UPK transaction recording to guide them in entering the information properly.

Superior Ownership Experience

Making documentation readily available to end-users will stop employees from attempting to reinvent the wheel. Procedures will also help to reinforce standardization across organizations and enable employees to repeat successes. On the flip side, documented processes will also help employees avoid mistakes others have made and perform their activities effectively. Using the applications efficiently and effectively is the second step to achieving a Superior Ownership Experience.

MAINTAINING APPLICATIONS

Tutor

Publisher includes ten reports that allow companies to analyze information contained in their process documents. These reports verify consistency throughout documents, consolidate critical information (such as policies), and identify errors.

When companies upgrade their business applications to a new point release, it may trigger changes in their business procedures and the way the system is used. With the Tutor Publisher impact analysis reports, it is easy to determine what documents and which job roles might potentially be affected by installing a new release. Keeping process documentation up to date gives employees a chance to correctly adopt and perform activities that are improved by the system upgrade.

UPK

UPK Developer enables you to record once and publish to multiple formats; it also makes the process of updating recordings simple and consistent. Updates are quickly made through the development tool and then those changes are applied across all published outputs.

UPK is one tool with one development effort. It was designed to be used by non-technical people who have subject matter expertise in the different business processes. You don't need programming skills to use the tool. The people in your organization, such as trainers, SMEs, project managers, and/or functional experts, can easily use this tool to create multiple outputs to support your training needs.

Superior Ownership Experience

The final step to achieving a Superior Ownership Experience is to reduce organizational impact of upgrades by managing the net change. Whatever your company's need for process and training documentation, Tutor and UPK can be fully integrated within a company's paper or browser-based standard, making it fast and easy to update information when changes are required.

CONCLUSION

Tutor and UPK can be instrumental to companies who are:

- 1) migrating from a legacy system to Oracle applications
- 2) upgrading to newer releases of the Oracle applications, or
- 3) documenting business practices for various compliance initiatives

By documenting business processes and procedures with Tutor and capturing the application data entry steps with UPK, you can provide employees with the exact information they need at the exact point they need it. You will also be able to provide transparency of your business practices to any other concerned audience (executive staff, internal auditors, external auditors, customers) and for formal regulatory requirements such as ISO9000, Sarbanes-Oxley, HIPPA, and SAS70).

A study from the Gartner group found that untrained users require 3 to 6 times more support than trained users. Many organizations don't fully invest in training their end-users. While this often saves money in the short-term, long-term costs will increase due to increased support requirements. A first-line call into the support center can cost $150 and a second-line call can cost $250. When users do not know what they are doing, it can translate to real dollar costs in lost productivity and support for an organization.

Using Tutor and UPK together provides Oracle customers with process documentation AND application transaction recordings to prepare end-users to be productive from the moment of go-live. Being Productive Day One by using Oracle's ideal end-user training solution helps companies achieve a Superior Ownership Experience throughout the application lifecycle.

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