



An Oracle White Paper  
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# HCM Succession Planning

## Executive Overview

Your management team of Baby Boomers is rapidly moving toward retirement. They'll take with them decades of hard won knowledge critical to the efficient running of your organization, unless you capture it now. With Oracle Tutor and UPK, and Oracle's Human Capital Management (HCM) Succession Planning approach, you can turn tribal knowledge into organizational knowledge and ensure a smooth transition to the next generation of senior employees.

## Introduction

### Looming Boomer Exodus

It's here. The boomers are poised to pass out of the workplace, carrying with them a valuable body of tribal knowledge about what works, who to talk to, how to get things done. Your organization must move to capture this knowledge now, before it's too late.

It's time to develop a plan to ensure that the next generation of managers has access to the right knowledge to continue doing business without a drop-off in performance. Your executives need the confidence that the new team can perform at the right level. Recognizing that knowledge retention is an issue to be managed will help you start to collect and organize this expertise.

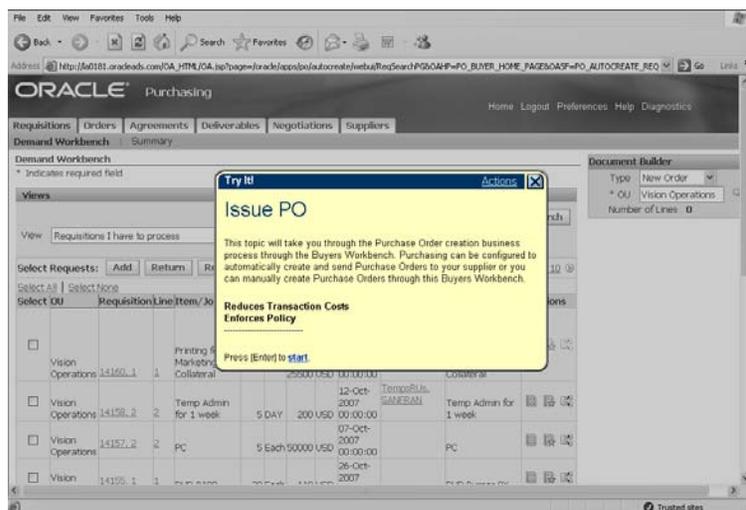
Preparing for resource transition management is made easier with Oracle end user documentation tools. Oracle Tutor is an easy to learn and use tool which facilitates the capture and deployment of key knowledge. Oracle UPK provides the ability to develop simulations of the critical systems transactions supporting your business processes. These tools, together with the Oracle HCM Legacy Planning approach, will help you quickly develop a formal but easy-to-use knowledge base of your key business processes. Oracle end user documentation tools will help you capture, codify, and deploy institutional knowledge to train the next generation of your most important resource – human capital.



application steps a user follows to complete a transaction. Once the system process is captured, UPK creates multiple outputs deployed via Microsoft Word as well as the online UPK Player. The Player simulations provide a user with an interactive simulated application environment in which to safely learn and practice, and where organizations can gauge the proficiency of their users.

When UPK simulations and Tutor procedures reference each other, a complete approach to deploying institutional knowledge is available to you. The illustration below is the opening of a simulation, providing business context prior to executing a transaction walkthrough.

## UPK Player Screen



Tutor and UPK work most effectively with the Oracle Applications family. Both are integrated with the Help System of the e-Business Suite, and the UPK “Do It” mode integrates into the Oracle Applications and provides context sensitive help for the EBS, Enterprise One, Enterprise, and Siebel applications.

## Oracle’s Approach

Oracle’s documentation approach is based on years of effective user documentation projects, with a specific focus on managing the transition of critical business knowledge in a large organization. Our approach is based on identifying areas of primary risk and moving quickly to documenting those. In a review with Executive Management, business areas are identified where immediate resource transition will occur, either through retirement or attrition. Key resources are targeted for process interviews.

Meanwhile, the organization decides who will be performing the documentation activity. Resources are trained in Tutor and UPK, and document ownership is defined. Tutor Author is so easy to use that some employees may document their own processes, within a larger framework. The document controller assembles the written procedures and generates the browser based desk manuals, process documents, and simulations. Once developed, documents can be deployed quickly for review as well as production use.

## Conclusion

### Oracle HCM Legacy Planning

Oracle's specific offering is a combination of product license and consulting services tailored to meet the needs of your organization.

### Oracle Product Licensing

- Oracle Tutor (includes both Author & Publisher)
- Oracle User Productivity Kit

### Oracle HCM Legacy Planning Benefits

Oracle's Tutor and UPK end user documentation tools are:

- Easy to learn and use
- Easy to deploy
- Supported by a project tested methodology

Documentation created with Oracle's Tutor and UPK:

- Is easy to understand, facilitating rapid uptake
- Improves end user productivity
- Eases the risk of resource transition

### Learn More

For more information about Tutor, visit [Oracle.Com](#) or the [Tutor Blog](#). Post your questions at the [Tutor Forum](#).



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Author: Chuck Jones  
Contributing Authors: Beth Renstrom

Oracle Corporation  
World Headquarters  
500 Oracle Parkway  
Redwood Shores, CA 94065  
U.S.A.

Worldwide Inquiries:  
Phone: +1.650.506.7000  
Fax: +1.650.506.7200

oracle.com



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