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 PeopleSoft’s Enterprise applications.

**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:

**Asset Management**
- Adding and Maintaining Assets
- Maintaining Parent and Child Assets
- Adjusting and Transferring Assets
- Performing Physical Inventory
- Working with Composite Assets
- Working with Leased Assets
- Working with Asset Budgeting
- Retiring Assets
- Archiving Asset Information
- Depreciating Assets
- Using User-Defined Depreciation
- Creating Accounting Entries
- Allocating Depreciating Expense
- Integrating with Other PeopleSoft Applications
- Changing Assets in Mass
- Tracking Repairs and Service
- Working with Joint Venture Processing
- Running Financials and SCM Reports

**Billing**
- Maintaining Customers
- Entering Bills Online
- Creating Consolidated Bills
- Working with the Billing Interface
- Creating Recurring Bills
Copying a Group of Bills
Researching Bills
Using Accumulations
Generating Invoices
Adjusting Bills
Generating Deferred Revenue
Generating Unbilled Revenue Accrual
Creating InterUnit Customers and Bills
Managing Installment Bills
Using Multiple Currencies
Running Reports

**Cash Management**
Managing Cash Positions
Managing Fees and Transfers
Managing Settlements
Processing Payments with Financial Gateway
Managing Bilateral Netting
Performing Cash Sweep
Managing Treasury Accounting Entries
Managing In-House Banking
Managing Investment Pools
Managing Facilities
Administering Cash
Running Reports
Using the Treasury Dashboards

**Contracts**
Introduction to Contracts
Creating Contracts
Working with Milestones
Creating Billing Plans
Creating Revenue Recognition Plans
Booking and Managing Revenue
Amending a Contract
Renewing a Contract
Managing Accounting Distribution
Managing Contracts Billing
Creating and Managing Limits
Managing Contract Notes
Pricing Contracts
Processing Contracts Billing
Working with PeopleSoft Project Costing
Maintaining Support Teams
Managing Contracts
Working with Federal Reimbursable Agreements
Processing Prepaid Amounts
Running Reports

eProcurement

eProcurement Navigation
Performing Searches
Creating Requisitions
Item Selection Methods
Approving Requisitions
Sourcing Requisitions into Purchase Orders
Processing Purchase Orders
Changing Requisitions
Receiving and Returning Items
Maintaining Vendor Information
Running Reports

Expenses

Maintaining Employee Profiles
Preparing Travel Authorizations
Preparing Cash Advances
Preparing Expense Reports
Processing Expense Report Exceptions
Preparing Time Reports and Time Adjustments
Using Commitment Control With Expenses
Managing Approvals in Expenses
Processing Expense Payments
Posting Expense Transactions
Viewing Accounting Transactions in Expenses
Running Reports

**FSCM Fundamentals**
Navigating Overview
Using Keys and Search Pages
Working with Pages
Adding and Updating Data
Using PeopleSoft Workflow

**General Ledger**
Setting Up User Preferences
Managing Journal Entries
Processing Journals
Using Commitment Control
Using Open Item Accounting
Using Interunit/Intraunit Accounting
Processing Multiple Currencies
Processing Allocations
Maintaining Budgets
Calculating Average Balances
Managing Interim and Year-End Processing
Running Reports

**Grants**
Preparing and Submitting Proposals
Managing Cost Sharing
Managing Awards and Projects
Applying Transactions to Grants
Preparing and Submitting a Protocol
Managing Award Billing
Managing Award Revenue
Managing Advances
Establishing Continuation Proposals
Performing the Award Close Out Process
Running Reports

**Inventory**
Setting Up Inventory Facility Structure
Setting Up Inventory Items
Maintaining Containers
Stocking Material (Putaway)
Setting Up Demand Fulfillment
Creating Material Stock Requests
Reserving Inventory
Managing Stock Shortages
Picking Inventory
Shipping Inventory
Replenishing Inventory
Transferring Stock
Fulfilling Work Orders from Maintenance Management
Managing Consigned Purchases Inventory
Using Vendor Managed Inventory
Counting Inventory Stock
Maintaining Par Locations
Maintaining Inventory
Running Reports

**Order Management**
Introducing Order Management
Maintaining Customers
Establishing Products and Items
Defining Transportation and Freight
Creating Communications
Establishing Holds
Creating Pricing Adjustments
Creating Sales Orders
Using Advanced CSR Options
Creating Sales Quotes
Defining Buying Agreements
Creating Counter Sales Orders
Using Express Order Entry
Defining Return Material Authorizations
Defining Order Bills
Running Reports

Payables
Maintaining Vendors
Entering Vouchers
Managing Vouchers
Using Control Groups
Establishing Recurring Voucher Contracts
Processing Payments
Running Batch Processes
Running Inquiries
Running Financials and SCM Reports

Project Costing
Introduction to Project Costing
Maintaining Projects
Using Project Trees
Analyzing Projects
Managing Resource Transactions
Project Costing Integration
Project Costing Integration with Asset Management
Project Costing Integration with General Ledger
Project Costing Integration with Procurement
Project Costing Integration with Time and Labor
Project Costing Integration with Expenses
Project Costing Integration with Third-Party Applications
Running Reports

**Purchasing**
Maintaining Vendor Information
Managing Items
Managing Requests for Quotes
Managing Vendor Rebates
Managing Requisitions
Changing Requisitions
Using Commitment Control
Administering Purchase Order Contracts
Creating Purchase Orders
Processing Purchase Orders
Managing Purchase Order Change Orders
Managing Purchase Orders
Managing Vendor Returns
Managing Receipts
Using Procurement Cards
Analyzing Procurement
Running Reports

**Receivables**
Introducing Receivables
Maintaining Customers
Entering Receivables
Entering Payments
Applying Payments
Reviewing Payments
Using Payment Predictor
Managing Account Aging
Managing Credit, Collections, and Exceptions
Maintaining Receivables
Updating Receivables
Transferring Receivables
Processing Exceptions and Collections
Processing Multiple Currencies in Receivables
Interfacing with U.S. Federal Systems
Running Reports

**Reporting Tools for FSCM**
Crystal Reports Basics
Creating Crystal Reports
Formatting Crystal Reports
Advanced Crystal Reports Options
PS/nVision Basics
PS/nVision Reporting on the Web
PeopleSoft Query Basics
Defining Query Selection Criteria
Advanced Query Options
XML Publisher Basics
Creating XML Publisher Reports
Advanced XML Publisher Options

**Strategic Sourcing**
Using PeopleSoft Strategic Sourcing Project Plans
Creating Bid Factors
Creating Events
Using Event Collaboration
Managing Events
Registering and Maintaining Bidders
Placing and Managing Bids
Analyzing Bids and Awarding Events
Using Optimization
Negotiating Events Using Multiple Rounds and Versions
Running Reports
Supplier Contract Management
Understanding PeopleSoft Supplier Contract Management
Creating a Contract Document - The Basics
Using the Document Management Page
Working with Contract Agreements
Working with the Contract Library
Running Reports

CONTACT US
For more information on UPK and application specific content for Oracle application product families go to http://www.oracle.com/us/products/applications/upk/index.html.