Oracle User Productivity Kit - Best Practices for Upgrade Projects
Executive Overview

Enterprise application upgrades are a major undertaking and if not planned and executed properly could result in major business disruption and eventually trickle up to become boardroom problems. Organizations that invest properly in a solid upgrade or implementation approach are minimizing risk and are more likely to experience long-term success.

Oracle’s User Productivity Kit (UPK) is a synchronized content development platform that provides value throughout the entire upgrade project lifecycle from the blueprinting, design/configuration stages through go-live and maintenance and support. It rapidly creates the critical materials needed for an application upgrade where knowledge must be captured, retained, and disseminated across the enterprise. All of these materials - system process documents, test scripts, simulations, instructor and student manuals, job aids, and in-application performance support - are simultaneously created through a single authoring session, dramatically reducing content development time and costs.

Unfortunately, most organizations have not yet realized the full potential of Oracle UPK as a platform that can support every phase of the software lifecycle for upgrade projects and full implementations. With over 4 million users worldwide, many organizations have seen tremendous success in getting their users up to speed quickly on their applications using Oracle UPK – but the real value of Oracle UPK goes far beyond that….Oracle UPK can be used throughout the entire project lifecycle - maximizing ROI on enterprise application investments, driving end user productivity, and reducing costs associated with upgrade projects.
Introduction

Enterprise applications have been implemented and upgraded numerous times by organizations – many have succeeded and many have failed. Using Oracle UPK for all phases of an upgrade project, including process review and design; application setup and configuration; testing; change management; knowledge transfer; and maintenance and support will ensure the success of the project. This white paper will address how Oracle UPK supports each of these activities along with the benefits of using pre-built content to dramatically speed time to deployment, decrease content development time, and increase the success of enterprise application upgrade projects.
Oracle UPK – Supporting the Upgrade Project Lifecycle

Oracle UPK supports the project lifecycle by allowing an organization to quickly create the critical documentation, training, and support materials required to drive project team and user productivity throughout the lifecycle of the application. The key to success with Oracle UPK is to understand how its functionality enhances traditional project tasks to not only ensure higher quality task completion but reduced time to realize benefits. This allows an organization’s resources to be efficient and spend more time running the business.

Oracle User Productivity Kit offers a complete list of assets for all phases of a software upgrade lifecycle

Implementation and upgrade projects vary in shape and size but several key tasks are common to all and need to be completed to facilitate a successful project.

Process Review and Design

One of the important early activities in a project is the review of existing system process information. This serves a two-fold purpose. First, existing system process information is required to drive the setup and configuration of the upgraded or new applications. This information is discussed during requirements gathering sessions, process overview walkthroughs and fit-gap analysis activities. During an upgrade project, this includes the review of new application features and functionality. Second, this information is also important for project team education. The project team and related system process owners are the group that will really
be responsible for ownership of the system long-term. Having this information in an easy-to-use and clear format will greatly enhance the application ownership experience.

Oracle UPK supports this activity through the system process documents and “See It” and “Try It” modes. In an implementation, system process documents support the review of key process information during the fit-gap analysis activity; that is, comparing leading business practice with current practice to identify gaps. In an upgrade, these same documents can be used to identify the differences in system functionality between application versions. The “See It” and “Try It” modes give the project team an opportunity for hands-on experience with the applications very early in the project, even before an internal application instance is set up. Getting team members on the system early promotes learning from the project’s inception.

Globally dispersed project teams can also promote best practices by communicating system process or procedure changes as well as gain the buy-in of the project team early on in the project. This will ensure changes are easily communicated and agreed upon amongst the members of the team. The full-featured sound editor can easily be used to convey these changes. And, the output can be published in presentation format and distributed to team members.

**Applications Setup and Configuration**

A key activity in any project is the setup and configuration of the applications to facilitate system development, testing and deployment. Documentation of the setup and configuration is also critical as it acts as the record of key business decisions and how those decisions manifest in the system – something very important for Sarbanes Oxley and other compliance initiatives.

Oracle UPK can be used to record content specifically related to the setup of the system. Since setup information may change as the project progresses, it is important to have a mechanism to quickly update these changes as they occur. Individual setup steps or a multiple of setup steps can be recorded and then published in the appropriate documentation format, either individual system process documents or full training manuals or instructor guides depending on how setup and configuration documentation is stored. For upgrades, ongoing maintenance of these documents for future projects becomes much easier with Oracle UPK.

Oracle UPK also enables project team members to easily collaborate with other project team or subject matter experts in the development of key process flows or system changes. They can facilitate collaboration by sharing the “See It” or “Try It” modes in the UPK Player. Additional information about the process or potential process can be provided through the use of Text Bubbles generated for each of the screen captures in the UPK Player.

The full-featured sound editor can be used to verbally communicate changes and gain buy-in of the process. With the ability to add sound, project teams can create engaging conceptual content with detailed information regarding the proposed process. And, the output can be published in presentation format and distributed to team members for easy consumption.
Testing

Testing is a critical step in the implementation and upgrade lifecycle. It ensures your enterprise software will run smoothly and efficiently from the first go-live date. All UPK topics can be modified quickly to allow for different testing scenarios. Oracle UPK can support all types of testing on a project including the following:

- **Integration testing** – Individual UPK topics can be recorded and sequenced to create end-to-end integration test scripts. These scripts can be published individually, printed and assembled for testing purposes or entire sets of topics can be published in a training manual format to create an end-to-end integration script. To facilitate this kind of content assembly, it is recommended to organize content along a process flow to leverage this material for end user consumption later in the project.

- **User acceptance testing** – Similar to integration testing, UPK topics can be organized by process flow or job role to simulate real transaction processing by end users. Content should be published and assembled for user acceptance testing as it is for integration testing.

- **Upgrade and system patch testing** – When working on an upgrade project or applying system patches, it is important to have standard regression test scripts to ensure consistency. For patch application, relevant scripts can be quickly modified to address the new functionality. For a full upgrade project, topic frames can be modified to address specific changes in the application versions without having to modify the entire content library.

With its integration to testing software such as Oracle Application Testing Suite, HP Quality Center, or IBM Rational Quality Manager, Oracle UPK can enhance the testing phase of the upgrade lifecycle by reducing test plan creation time, improving accuracy, and providing the foundation for reusable training documentation, application simulations, and end-user performance support—all critical assets to support an enterprise application implementation or upgrade.

Change Management

System processes are the linchpin of successful change management efforts. System processes also represent the point at which people and technology meet— or “collide” in cases where processes have not been standardized and change has not been communicated effectively or consistently. The degree to which organizations can standardize their system processes...
increases the likelihood that people within an organization will understand, embrace and even drive change.

With any enterprise application implementation or upgrade, users will interact with the system differently. Whether it is changes to system process or the addition of new functionality, managing the change is a critical part of the process. Regardless if enterprise applications are being implemented for the first time or the end users are highly experienced, these changes need to be communicated clearly.

The use of the “See It” and “Try It” modes can be used to effectively relate the key changes that are occurring within an organization as a result of the implementation or upgrade project. This is particularly important for large enterprises with project teams and end-users globally distributed, making on-premise knowledge transfer impractical. The use of e-Learning also reinforces to end users that the organization is embracing technology to support business operations.

Change management requires communication, knowledge transfer, and measurement to ensure success. Supporting the human performance side of any implementation is a very critical task and Oracle UPK plays a large role in the support of organizational change management activities.

Knowledge Transfer and eLearning

Enterprise application users that are not given the proper guidance can take up to four times longer to become proficient at new job tasks or upgraded applications and they require up to six times more support than educated users. In addition, users have different preferred learning styles which enable them to master new information in the most effective way. With Oracle UPK, three different learning methods allow users to watch simulations (See It), practice in a simulated environment (Try It), and test their knowledge (Know It) to ensure competency. And, the full feature sound editor enables content developers to create engaging conceptual and transactional content for users to enhance the learning experience.

Implementing Oracle UPK as part of a blended learning approach offers greater flexibility around the deployment of end-user education. In a traditional instructor-led training (ILT) class, users do not have the advantage of an introduction to the new software prior to entering the classroom; therefore, much of the initial classroom time is devoted to user interface and navigation. Using Oracle UPK self-paced e-Learning that simulates a user’s environment is very

“If I were talking with someone at another firm, I’d ask them how long it takes them to develop content, and I’d say, ‘You can cut that down by 75 percent.’ And then I’d ask them how many tools they were using, and I’d say, ‘Picture yourself with one—the User Productivity Kit.’”

MaryEm Musser, Ctr for Professional Development, Asst Director, BDO Seidman
effective in teaching a user the fundamental navigation of the applications, leading to more manageable ILT delivery timelines, or the elimination of the need for ILT altogether.

Users can gain knowledge by taking short, focused lessons from their own desktops as their schedule permits. This provides the interactive reference users need while actually performing the tasks for the first time, or can serve to keep the new functionality fresh in their mind between the training and go-live. Utilizing Oracle UPK’s self-paced e-Learning tutorials for ongoing support and refresher training also provides users with confidence and reduces help desk costs.

Using UPK with a Learning Management System

A Learning Management System is a software application designed to help manage training within organizations, specifically around e-Learning, although ILT programs can also be managed with most LMS solutions. Typically, the LMS will manage the training administration database and link to the organization’s HR system. LMS solutions vary in functionality depending on the vendor, but should be capable of managing ILT and e-Learning courses, as well as tracking user assessment test scores. Additionally, an LMS should be capable of directing and recommending training options based on a user’s schedule requirements and job role.

This functionality is very beneficial when blending ILT with e-Learning as it allows for easier administration of training deployment while still providing the user with the training they require. The “See It”, “Try It” and “Know It” modes within Oracle UPK are most relevant to the use of an LMS solution. For those organizations not using an LMS solution, the Usage Tracking tool in Oracle UPK is more than adequate to provide reporting on performance and learning retention.

One factor to be considered when using a blended learning approach is to develop and deploy content that will be portable and delivered in different mediums – CD-ROM, corporate Intranet, or launched through an LMS. If the desired method of distribution is an LMS, it is important that the e-Learning content complies with eLearning industry standards, the most widely accepted of which is SCORM (Shareable Content Object Repository Model). All UPK content is SCORM compliant by outputting to an LMS package during content publishing.

Knowledge Transfer Deliverables

There are several key deliverables that Oracle UPK produces to support change management and knowledge transfer practices.
• Simulations/Practice – The “See It”, “Try It” and “Know It” modes can be used early to effectively relate the key changes that are occurring within an organization as a result of the upgrade. This is particularly important for large enterprises with project teams and end-users globally distributed, making on-premise, classroom based training impractical. These modes can also be used throughout the training process to provide constant reinforcement and refresher training. Another key to the use of practice simulations is that the need for a training instance is greatly reduced, saving time and resources. It is recommended to have an instance available to enhance user acceptance during training to perform exercises, but in those environments where hardware capacity is limited, UPK simulations can be used in place of a live training system.

• Assessment Exercises – The “Know It” mode can be used as an assessment exercise to gauge user retention on topics solely delivered via self-paced e-Learning. Competency can be tracked in UPK Usage Tracking or via an LMS as previously described.

• Training Manuals – Both student training manuals and instructor guides can be easily published out of Oracle UPK to support ILT training.

• Performance Support – Traditionally, users have a “sandbox” instance where they can practice new application skills before performing work in the production system. The “Do It” mode reduces the need for this practice instance since it is linked directly into the online help and guides the user through the transaction being performed one step at a time.

• Presentations – Content can be published in presentation format to communicate conceptual information. Presentations can also be used to educate project team members about best practices on business or system process design.

• Job Aids – Like all content in Oracle UPK, job aids can be easily published to provide quick desktop reference for users after training is completed and real work is being performed in the production system.

A key consideration some organizations overlook is the amount of time and effort it takes to keep various forms of content current and synchronized – content such as system process documents, training manuals, instructor-led training guides, and job aids. Over time, many organizations find it onerous to keep these forms for content current, let alone in sync. As a single synchronized content development platform, Oracle UPK makes updates in one place, while propagating those changes out to all the forms of content through a single publishing session. Oracle UPK is unique because it keeps producing value throughout the entire software ownership lifecycle, not simply at initial application implementation or upgrade.
Maintenance and Support

Ongoing maintenance and support of the applications is another key aspect of any implementation or upgrade. Oracle UPK can support the key components of an ongoing performance support, maintenance, and learning strategy and can include the following:

• Performance support – By leveraging the “Do It” mode within the applications, users can perform tasks with guidance allowing them to become more confident and gain self-sufficiency more quickly. The “Do It” mode can also be leveraged in working lab environments – sessions in which personnel perform actual work in the production system with the support of trainers or project team members. Working labs are an effective means to ensure user acceptance and success in performance of job tasks.

• Self-paced e-Learning and ongoing refresher training – As previously described.

• Online procedures – System process documents can be published online in HTML or PDF formats and accessible via an intranet.

• Quick reference job aids – As previously described.

Pre-built Content

Oracle UPK pre-built content is Oracle application-specific model content that can be used throughout the project lifecycle and reflects industry best practices with detailed conceptual information about how the Oracle application works. It is designed to educate the project team and line of business owners about best practices of the application’s usage or the system processes and helps them determine if a ‘vanilla flavoring’ of the software and the model content meets their organization’s needs or if they need to customize the software and system process flows to mirror their actual system processes.

Pre-built content can be used throughout the software implementation, however, it is extremely valuable in the early stages of any project – as it provides the project team with a ‘starting point’ that is built around best practices. Once this content is customized, the same content can then be used to create system process documents, test scripts, job aids, simulations, and training materials throughout each of the project phases – saving a tremendous amount of content development time.
Conclusion

Oracle UPK provides value throughout the entire upgrade project lifecycle from the blueprinting, design/configuration stages through go-live and maintenance and support. It rapidly creates the critical materials needed for an application upgrade. All of these materials - system process documents, test scripts, simulations, instructor and student manuals, job aids, and in-application performance support - are simultaneously created through a single authoring session dramatically reducing content development time and costs. And, Oracle UPK pre-built content provides a jump start to any upgrade project or implementation.

Organizations that realize the full potential of Oracle UPK will maximize their ROI on their application investment, drive productivity, and reduce the cost of their upgrade project.