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 Edwards’ 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:

**Accounts Payable**
- Setting Up the Accounts Payable System
- Entering Supplier Information
- Entering Vouchers
- Using Other Voucher Entry Methods
- Processing Recurring Vouchers
- Processing Logged Vouchers
- Working With Unposted Vouchers
- Processing Vouchers
- Working With Posted Vouchers
- Automatic Payment Process - Preparing Vouchers for Payment
- Automatic Payment Process - Working with Payment Groups
- Automatic Payment Process - Working with Payments
- Processing Manual Payments
- Working With Unposted Manual Payments
- Working With Manual Payments
- Working with Supplier Ledger and Payment Information
- Processing Accounts Payable Drafts
- Working With Accounts Payable Netting
- Updating and Reviewing Tax Information
- Using Accounts Payable Reports
- Running the Accounts Payable Period-End Process
- Processing Multicurrency
- Setting Up Automatic Payment Processing

**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 Program
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

Benefits
Setting Up DBAs
Setting Up Pay Type Tables, Date Codes, and Eligibility Testing
Setting Up Benefit Plans and Plan Options
Setting Up Benefit Groups and Categories
Setting Up Enrollment Parameters
Setting Up Flexible Benefits Administration
Enrolling Employees in Benefits Plans
Working with Dependents and Beneficiaries
Reviewing Employee Enrollment
Administering COBRA
Managing Nondiscrimination Testing

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

**Capital Asset Management**
Understanding the Capital Asset Management System
Setting Up the Capital Asset Management System
Setting Up Equipment Master Records
Defining Supplemental and Specification Data for Equipment
Tracking Location Transfers of Equipment, Site Information, and Customer Information
Working With Other Equipment Information Options
Setting Up Information for Work Orders
Entering Corrective Work Orders
Describing Workflow for Approvals
Working With Work Order Mass Update for Equipment Work Orders
Adding Parts Lists and Labor Details to Work Orders
Understanding Maintenance Costing
Tracking Costs Against Work Orders
Reviewing Maintenance Costs
Working with Equipment Meter Readings
Understanding Equipment Preventive Maintenance
Setting Up the System for Equipment Preventive Maintenance
Scheduling Preventive Maintenance Tasks
Setting Up Linked Service Types, Maintenance Routes, and Model PMs
Working With Maintenance Forecasts
Working With Condition-Based Maintenance
Setting Up Calendars, Resources, and Availability
Managing Crew Schedules
Assigning Resources to Crew Schedules
Understanding Resource Assignments
Completing Orders on the Schedule
Assigning Resources to Work Orders
Using Failure Analysis With Work Orders
Working With Equipment Cost Analysis
Understanding CAM Global Updates and Data Purges

**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**
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

**Fundamentals**
Describing Basic Skills and Navigation
Describing 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

**General Ledger**
Understanding General Ledger Functionality
Setting Up the System
Setting Up the Organizational Structure
Working with Supplemental Data for Business Units
Setting Up the Chart of Accounts
Entering Journal Entries
Entering Other Types of Journal Entries
Working with Unposted Journal Entries
Posting Journal Entries
Working with Posted Journal Entries
Working with Batch Journal Entries
Understanding Intercompany Settlements
Working with General Ledger Multi-Currency
Working With Allocations
Working with Account Reconciliation
Working with Budgets
Working with Account Consolidations
Reviewing Balances and Transactions
Generating Financial Reports
Verifying Data Integrity
Completing Closing Processes for General Ledger
**Grower Management**
Configuring the JD Edwards EnterpriseOne Grower Management System
Entering Farms, Blocks, and Harvests
Using the Harvest Workbench
Maintaining Blocks and Harvests
Managing Harvest Estimates
Managing Farming Activities
Managing Receipts
Setting Up Costing

**Grower Pricing and Payments**
Understanding Grower Pricing and Payments
Setting Up the Grower Pricing and Payments System
Creating Grower Contracts
Managing Grower Contracts
Managing Contract Pricing
Processing Advance Payments
Managing Pay on Proceeds
Processing Interim Payments
Performing Final Settlements

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

**Human Capital Management Fundamentals**
Understanding Human Capital Management Fundamentals
Setting Up System Options
Setting Up Tax Information
Understanding Workflow for HCM
Understanding User Defined Codes for HCM
Setting Up Pay Types
Setting Up Deductions, Benefits, and Accruals
Setting Up Additional Information for DBAs
Setting Up Tax Deferred and Taxable PDBAs
Setting Up Advanced DBAs
Setting Up Deductions for Wage Attachments
Running DBA Reports
Setting Up Employee Information
Adding Employee Records One at a Time
Entering Employees Using Quick Hire
Assigning Tax Areas With the GeoCoder
Entering Additional Employee Information
Entering Employee Instructions
Revising Employee Information
Creating Parent/Child Relationships
Working With Point-In-Time Employee Reports
Setting Up Web Mail Merge
Using Web Mail Merge
Working With Employee History and Turnover Data
Defining Jobs

**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

**Manufacturing Management Engineer to Order (ETO)**
Understanding JD Edwards EnterpriseOne ETO
Setting Up JD Edwards EnterpriseOne ETO
Setting Up Cost and Account Classifications
Setting Up Job Cost Integration
Integrating ETO with Microsoft Project
Initiating Projects
Creating Projects
Working with Projects and Project Tasks
Scheduling Project Tasks
Working with Project Costs
Generating Quotes and Proposals
Using Project Planning with ETO
Loading Project Budgets to the Job Cost Budget
Performing Project Requirements Planning
Creating Orders for a Project
Setting Up Project Commitments
Using Project Execution and Control
Generating Project Reports and Alerts
Closing Projects

Manufacturing Management Process Manufacturing
Understanding JD Edwards EnterpriseOne Shop Floor Management for Process Manufacturing
Setting Up JD Edwards EnterpriseOne Shop Floor Management for Process Manufacturing
Setting Up Constants for Process Manufacturing
Setting Up Product Data for Process Manufacturing
Creating Process Work Orders
Managing Process Work Orders
Processing Commitments for Process Work Orders
Working with Availability and Shortages for Process Work Orders
Managing Issues and Material Movement for Process Work Orders
Recording Hours and Quantities for Process Work Orders
Completing Process Work Orders
Managing Process 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 Two-Way Voucher Match
Using Three-Way Voucher Match
Using the Voucher Match Automation Process
Using the Evaluated Receipt Process
Managing Suppliers
Purchasing for Subcontract Management
Purging Data
Running Reports

**Project Costing**
Understanding the Job Cost System
Setting Up the Job Cost System
Working With Job Master Records
Setting Up Cost Code Structures
Entering Budgets for Jobs
Creating Transactions that Affect the Job Cost System
Working with Job Status Inquiry
Setting Up Additional Ledgers for Job Status Inquiry
Managing Job Progress
Using Performance-Based Labor Forecasting
Estimating Profit Recognition
Forecasting Job Revenue and Cost
Performing the Draw Process
Generating Job Cost Reports
Understanding the Change Management System
Setting Up the Change Management System
Creating Change Requests
Committing Contracts and Subcontracts
**Real Estate Management**
Setting Up the Real Estate Management System
Setting Up Facility Information
Setting Up Lease Information
Working with 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

**Requirements Planning**
Understanding JD Edwards EnterpriseOne Requirements Planning
Setting Up JD Edwards EnterpriseOne Requirements Planning
Managing Supply and Demand Information
Managing Forecasts
Defining Master Production Schedules
Generating Master Production Schedules
Evaluating Master Production Schedule Output
Using Forecast Consumption
Using Capacity Planning
Defining Material Requirements Planning
Generating Material Requirements Planning
Creating Multifacility Plans
Creating Supplier Release Schedules

**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
Processing Orders with Taxed Unit Price
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

**Time and Labor**
Understanding Time and Labor
Setting Up Time Entry Processing Options
Setting Up Automatic Accounting Instructions for Time and Labor
Setting Up Piece Rate Processing
Entering Timecards for Employees
Setting Up Time Entry Batch Processing
Overriding Timecard Information
Processing Journal Entries
Setting Up Timecard Automation
Setting Up Functions and Formulas for Timecard Automation
Managing Timecards Created by Timecard Automation
Setting Up Global Leave Administration
Administering Global Leave Administration
Creating Employee Assignments
Managing Timecards Using the Advanced Labor Management Workbench

**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.

Copyright © 2004, 2013, Oracle and/or its affiliates. All rights reserved. Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners. The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing. PT# UPKE191D002613